

UNITED STATES BANKRUPTCY COURT DISTRICT OF VERMONT



THE CM/ECF USER GUIDE

Creditor's Attorney Manual

THE CM/ECF CREDITOR MANUAL

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ACCESSING CM/ECF

The CM/ECF System is a web based software program. CM/ECF court users process cases through the federal courts' restricted intranet, while attorneys and other public users will submit pleadings and view case data from the internet. Both court and external users have different levels of access to screens via menu selections and functionality according to their needs.

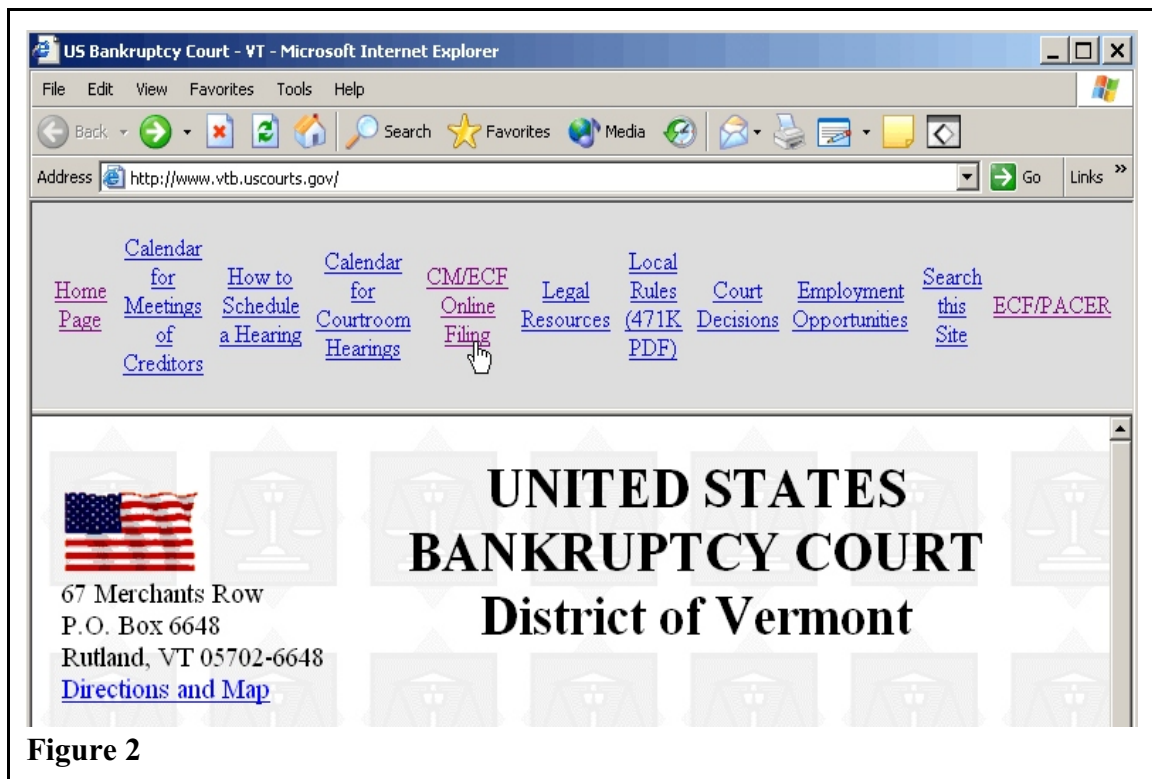
Step 1: Open Netscape Navigator or Internet Explorer (Figure 1)



Figure 1

To access the court web site, open Netscape Navigator or Internet Explorer and enter the URL (address) of the court's website www.vtb.uscourts.gov in the browser's Address field. Familiarity with browser navigation and functionality is recommended for successful and efficient use of this system.

Step 2: Select CM/ECF Online Filing (Figure 2)



This will take you to the CM/ECF home page from which you can access various forms and information relation to the electronic case filing system.

Step 3: Select the Appropriate Database (Figure 3)

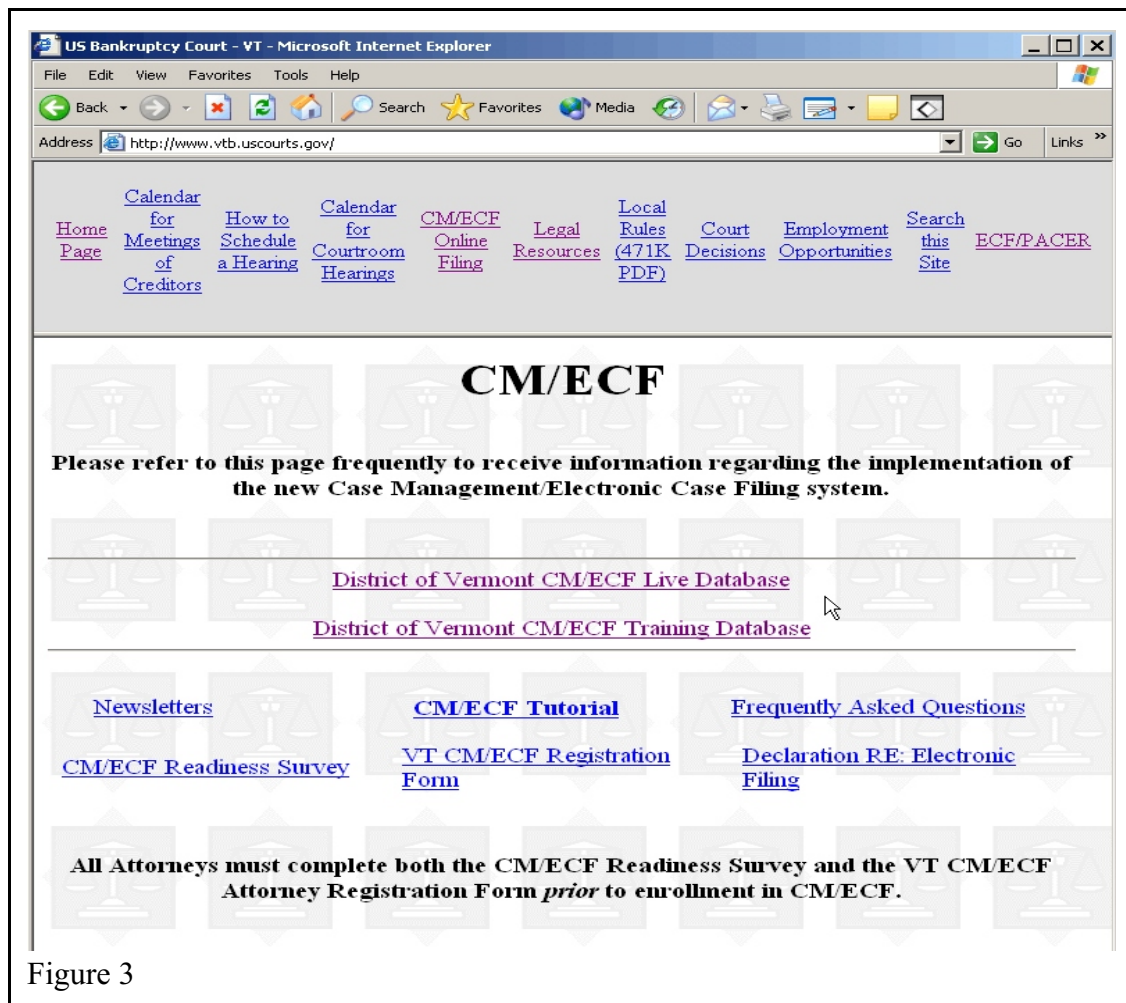


Figure 3

A training version of the system is provided for practice purposes. It is strongly recommended that participants take advantage of filing documents in the training database before filing a document in the “live” database.

NOTE: A different set of logins and passwords are issued for the “Training and “Live” systems

Step 4: Select Appropriate Database Again (Figure 4)

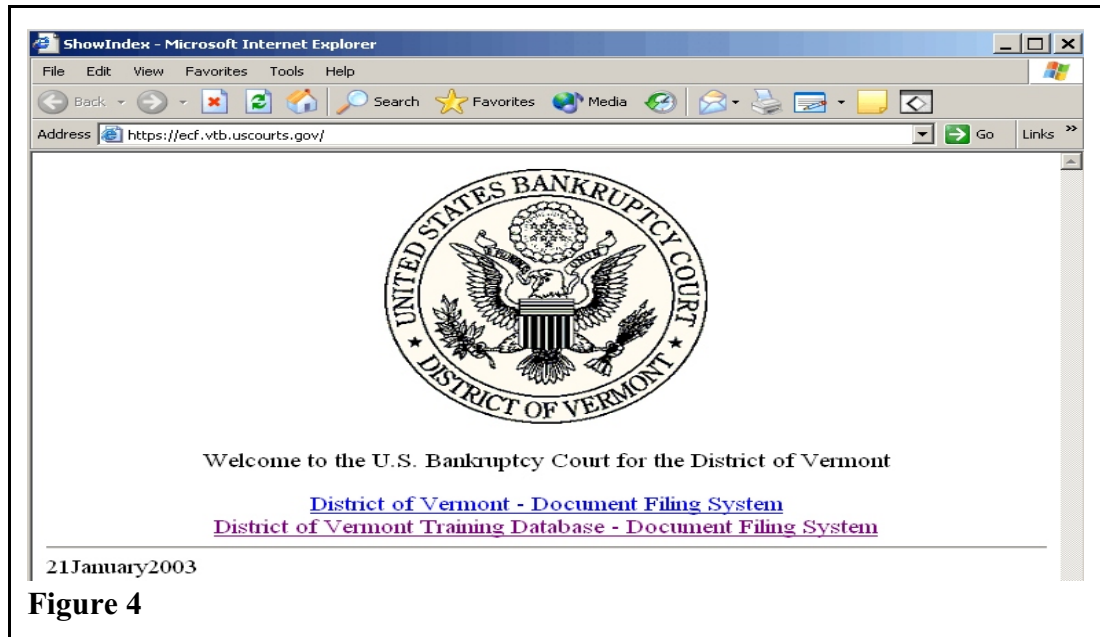


Figure 4

The system requires you to select either the “Live” or “Training database again. This helps insure that documents do not get filed in the wrong database.

Step 5: Login to CM/ECF (Figure 5)

VTB Training Database Area - login - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Mail Print Print Preview Links

Address <https://ecf-train.vtb.uscourts.gov/cgi-bin/login.pl> Go

ECF/PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

An access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1998 session, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

3 Column Mailing Labels

3 Column Mailing Labels are now formatted correctly for label printing. The file for printing will be a PDF file. When printing the matrix on labels, make sure the print option "Fit to Page" is **NOT** checked.

To access 3 Column Mailing Labels, go to "Reports" and select "Mailing Labels by Case". For "Print format", select "3 col PDF".

Authentication

Login:

Password:

client code:

Login Clear

CM/ECF has been tested and works correctly with Netscape 4.6x, Netscape 4.7x and Internet Explorer 5.5.

Figure 5

You will use two sets of logins and passwords: one for CM/ECF filing and the other for Public Access to Electronic Records (PACER) access for queries and reports. Initially you will enter your CM/ECF login and password which has been issued by the court. This login and password allows electronic filing of documents, but not access to reports and queries. For these functions, you will need a PACER login and password. This is covered in more detail on the next page.

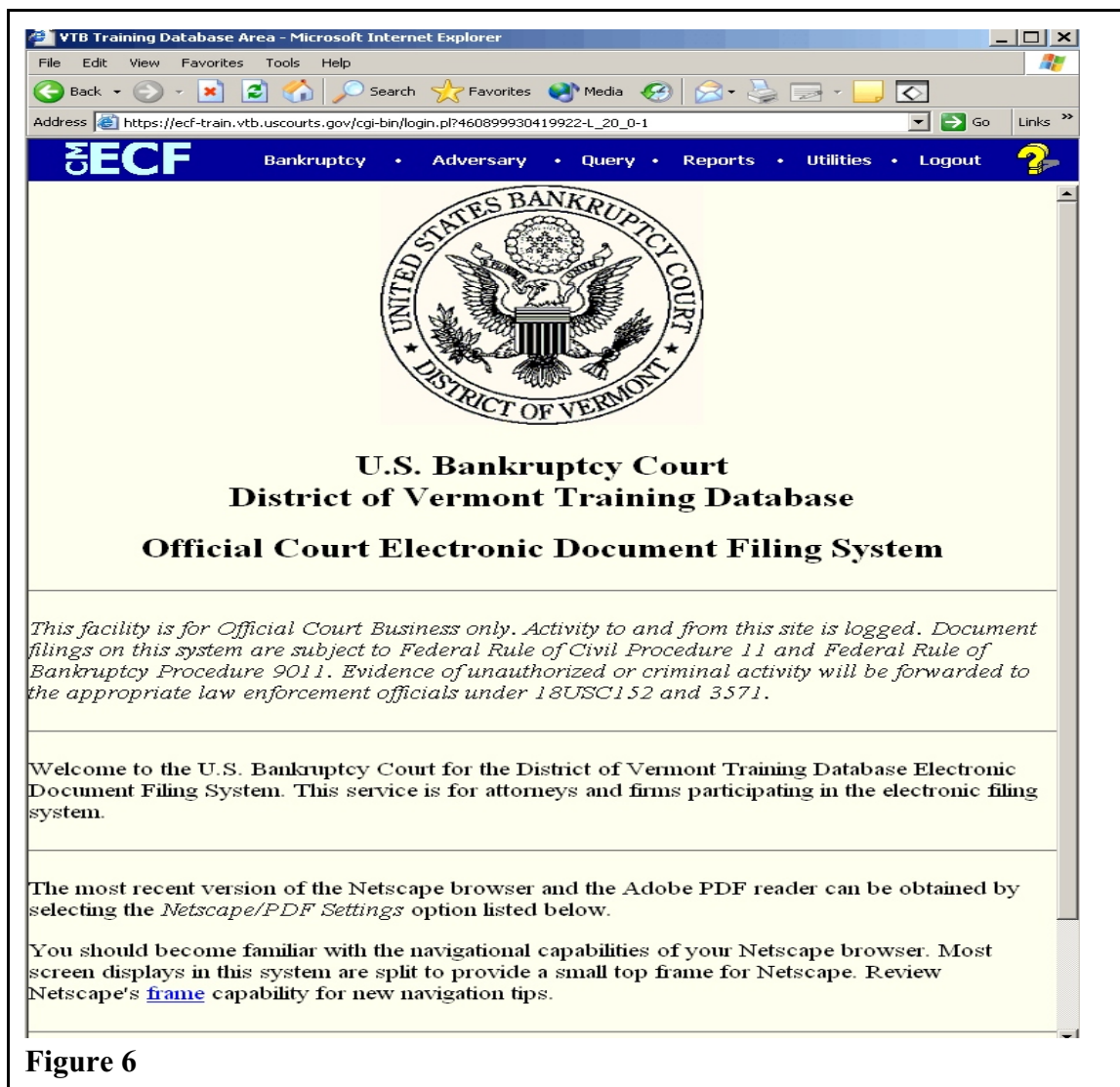
NOTE: The registered user's login and password is the electronic equivalent of their signature pursuant to Vt. LBR 9011-1(c)

Your login and password fields are case sensitive. A login of martk cannot be entered as MARTK or MartK.

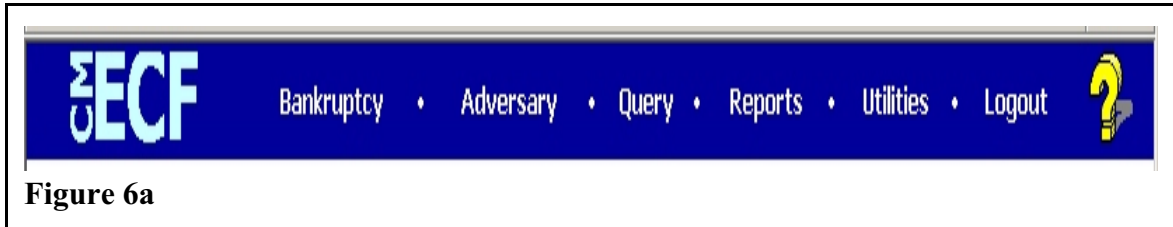
The client code field is optional and is designed for PACER users to associate PACER activity to a specific client.

This login screen will subsequently appear when users select any report or query selection from a CM/ECF menu. You must supply a login and password provided by the PACER Billing Center to access reports or queries. The PACER program charges 7¢ per page to view, save or print a document or report. PACER information and registration is available at <http://pacer.psc.uscourts.gov/>.

Step 6: The CM/ECF Main Menu screen displays (Figure 6)



Access to the various modules is provided by the blue Main Menu Bar at the top of the screen (Figure 6a). Each selection is a hyperlink to another set of options or hyperlinks allowing participants to file documents, query, view or print a docket sheet, generate reports or maintain their accounts.



This menu is also used to exit the system. The preferred method to exit the CM/ECF is to click on the **Logout** hyperlink on the CM/ECF Main Menu Bar.

CM/ECF MAINTAIN USER ACCOUNTS

All CM/ECF users will be issued an account with a user login and password. The CM/ECF login provides registered users the ability to submit pleadings electronically to the court. Public users (attorneys and creditors) must also log into PACER to inquire on cases or look at reports. Existing PACER logins and passwords will be accepted.

Using the Maintain your ECF Account menu, you can access and update your own name, mailing and e-mail addresses, phone and fax number and password. You can therefore control the accuracy of your own information in a timely manner.

This module explains how you can update:

- User name address and other data
- E-mail information
- electronic noticing preferences
- user passwords

Step 1: Select Utilities (Figure 1)

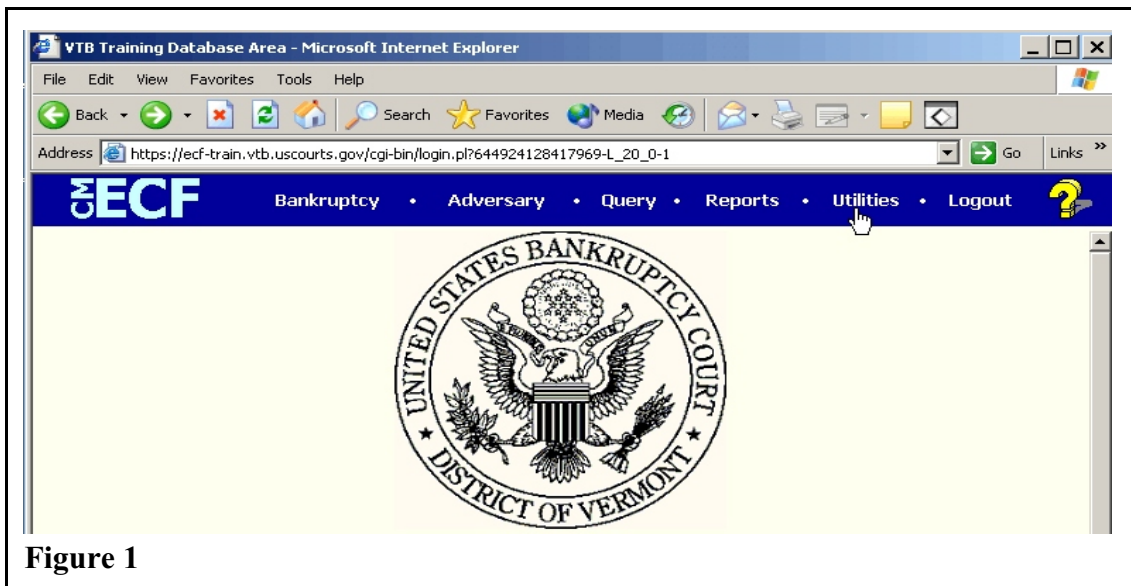


Figure 1

Select **Utilities** from the Main CM/ECF menu.

Step 2: Select Maintain Your ECF Accounts (Figure 2).

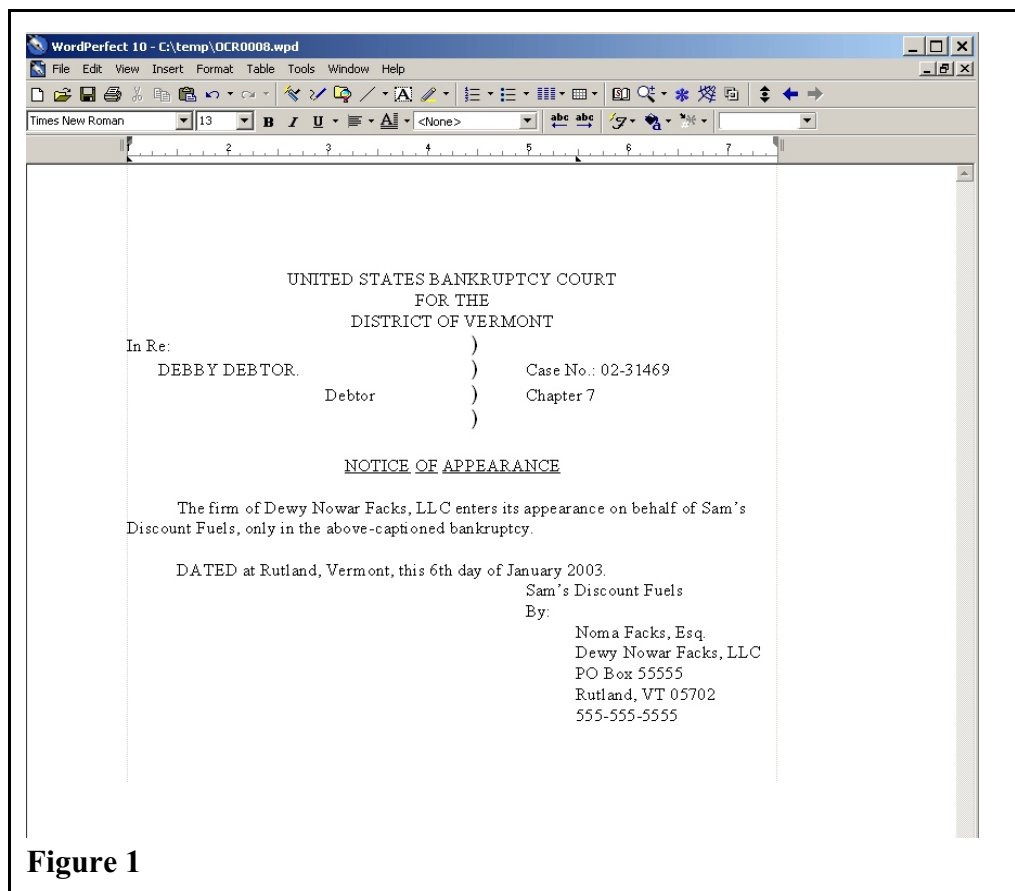


How to Convert a Document to PDF (Portable Document Format)

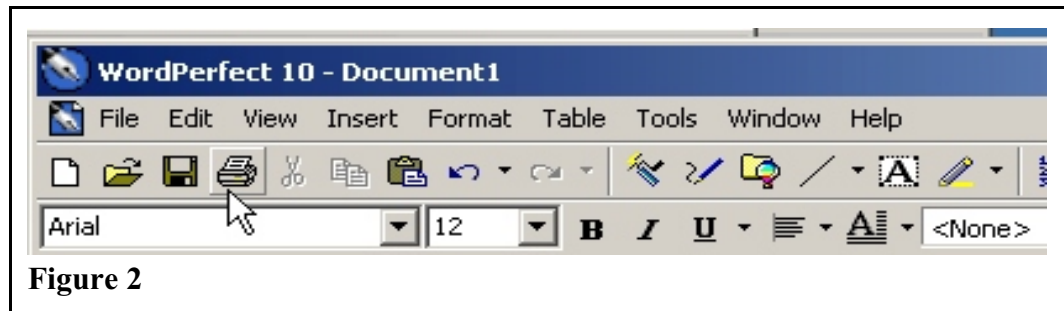
All documents filed with the court through CM/ECF must be converted to PDF. For documents that you create in your office using word processing software, the procedure will closely follow the example given here. For documents from another source that must be scanned into the system (i.e. mortgages, titles, purchase and sale agreements), refer to the documentation provided with your scanner hardware and/or software.

The following example is done using WordPerfect, but most word processing software will follow a similar procedure. If your does not, contact the vendor's user support.

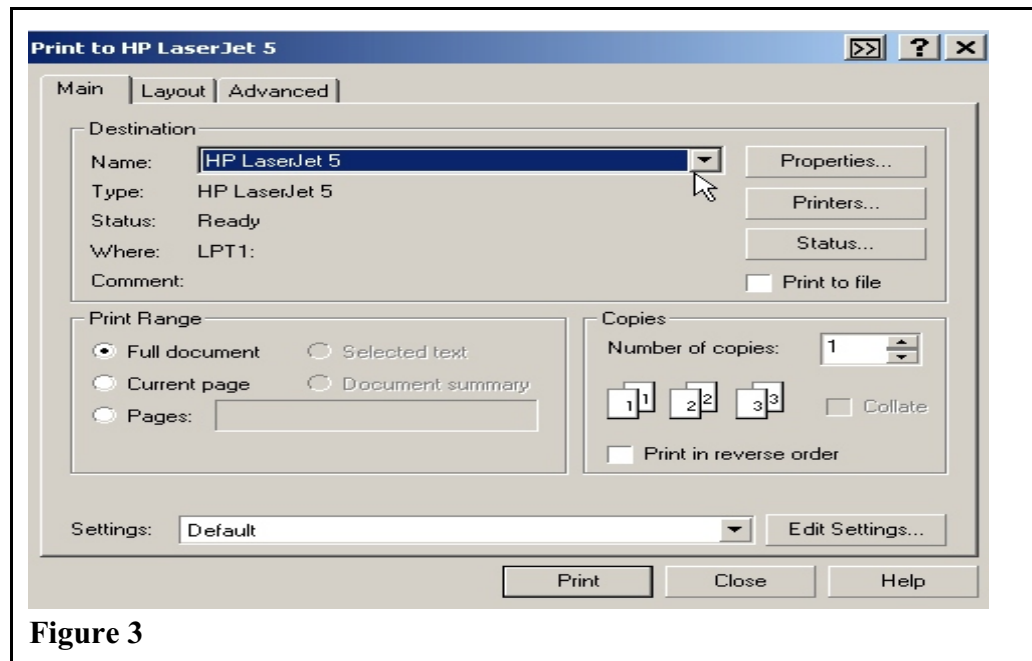
Step 1: Create a document (figure 1)



Step 2: Click on the Printer icon on your toolbar (Figure 2).



Step 3: The “Print to” dialogue box appears. (Figure 3)



Click on the down arrow on the “Current printer” or “Name” field.

Step 4: Select Acrobat PDF Writer from the drop down menu. (Figure 4)

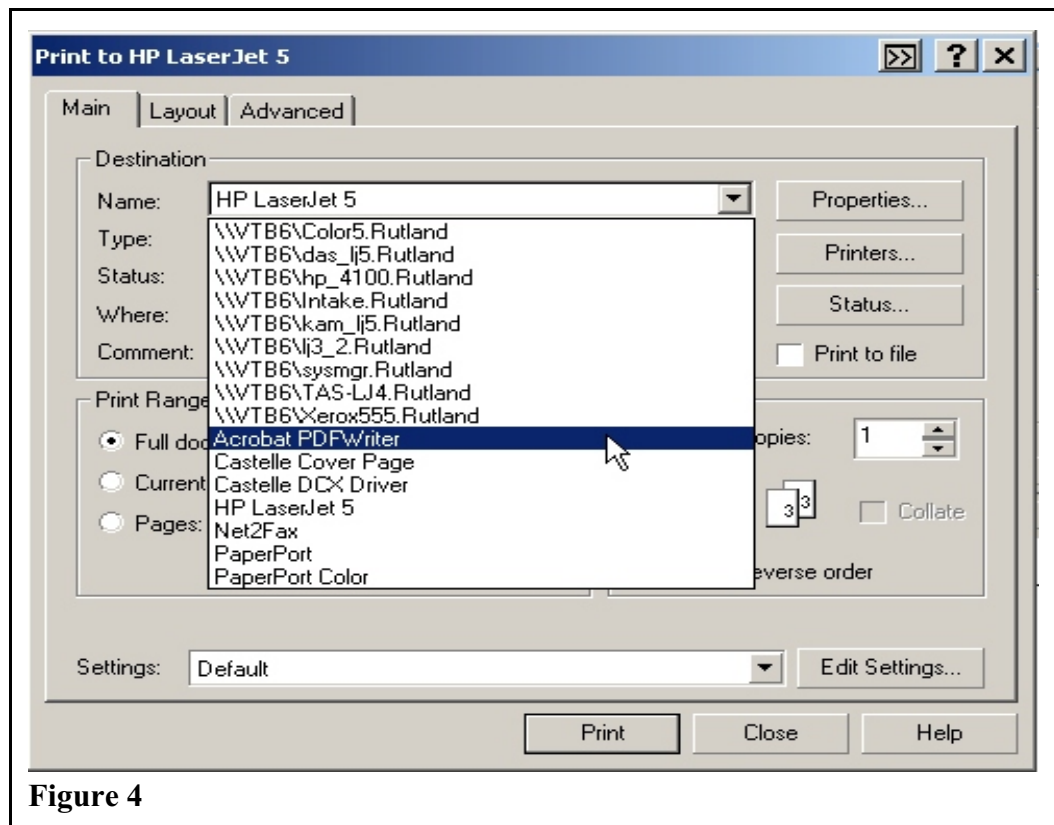


Figure 4

Click [Print]

NOTE: Be sure to choose Acrobat PDF Writer, not PDF Distiller. Problems have been associated with trying to upload PDF documents created with Distiller. If PDF Writer is not one of your options on this drop down list, Acrobat was not installed properly on your machine. Instructions for optimal installation are at the end of this section.

Step 5: Select the directory where the PDF File will be saved. (Figure 5)

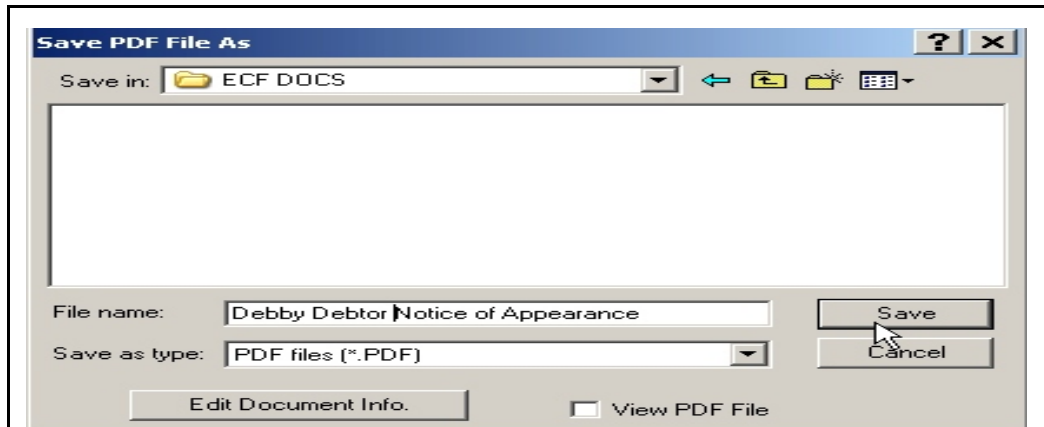


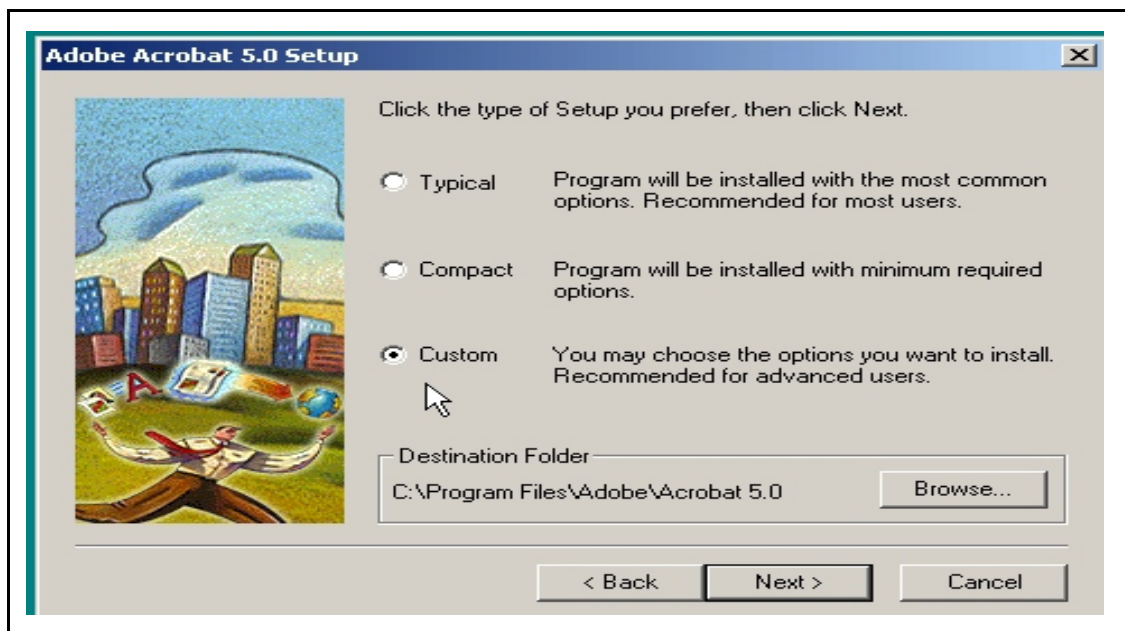
Figure 5

Click [Save]. The document is now saved as a PDF document.

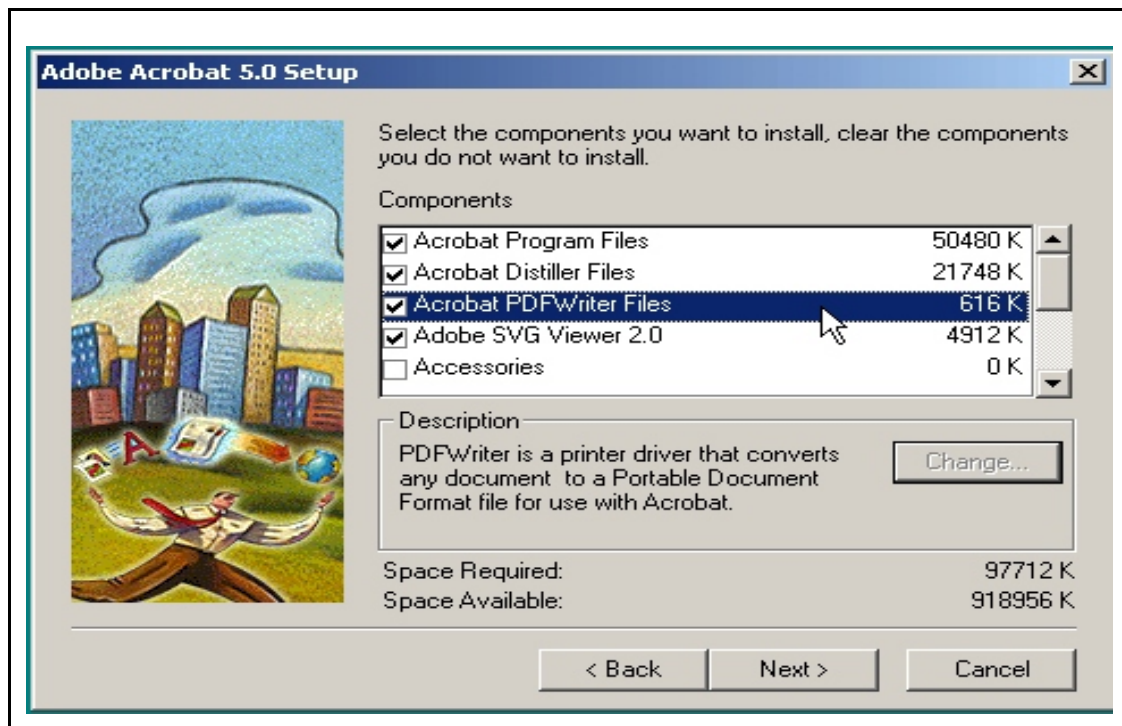
TO INSTALL ADOBE ACROBAT

If PDF Writer is not one of your printer options, you will need to uninstall Adobe Acrobat and re-install it using the "Custom Install" option.

Insert the installation disk and follow the prompts until you come to the Select the type of Setup screen. Choose "Custom" setup.



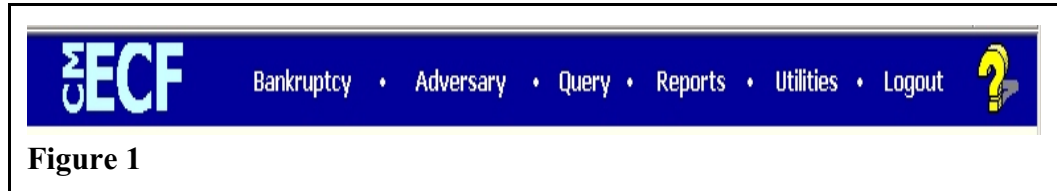
Next select the components you want to install. Be sure the box next to Acrobat PDF Writer Files is selected.



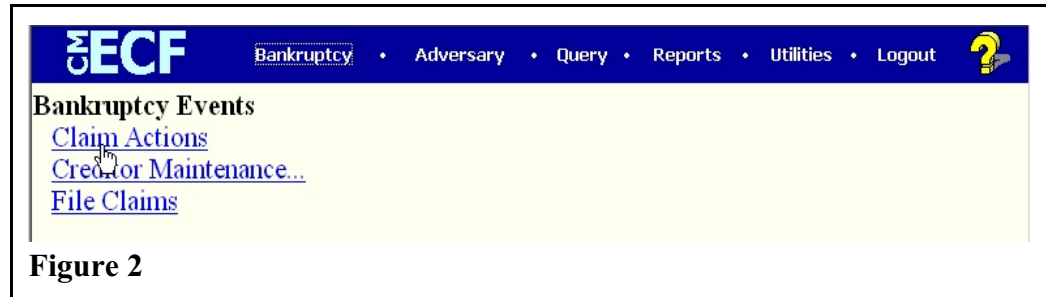
Click next and continue following installation prompts.

Request for Notice

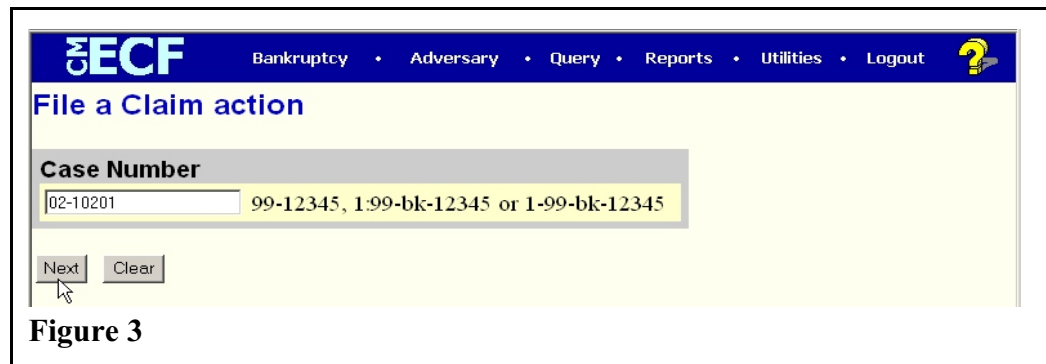
Step 1: Select Bankruptcy on Main menu (Figure 1).



Step 2: Select Claim Actions (Figure 2).



Step 3: Enter the Case Number (Figure 3).



Click [Next].

Step 4: **Select Event (Figure 4).**



Figure 4

Select Request for Notice - Creditor

Click [Next]

Step 5: **Select the Party screen appears (Figure 5).**



Figure 5a

A list of all parties who have appeared in the case displays.

Note: **Even if your client is a creditor who has previously filed a claim, it usually will not appear on this list. The only parties that appear on this list are those who have filed a notice of appearance, or a pleading (motion or responsive pleading).**

If your client is listed, click the creditor's name to highlight it, Then click [Next]. Proceed to Step 11.

If your client is not listed, click on "Add/Create New Party".

Step 6: Search for a Party Screen Appears (Figure 6).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Search for a party

SSN Tax Id

Last/Business name

Figure 6

This screen allows you to search the court's database of all parties who have ever appeared in any case at any time. You usually will appear in this list.

The [Search for A Party Routine](#) requires searching the master party file to determine if the party to be added is listed in that file. The most effective way to search for creditors in the database is to search by name.

To search by name, type the first few letters of a last name or a company name in the field labeled "Last/Business Name". You must type at least two letters, but the more letters typed, the smaller the resulting list will be. For example, typing "Sm" will retrieve Smith, Smithe, Smithers, etc. The party search mechanism is case sensitive so that names must be capitalized. Type "sm" instead of "Sm" and the search result will be: "No person found."

Step 7: The Party Search Results screen is displayed (Figure 7a).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Search for a party

SSN Tax Id

Last/Business name

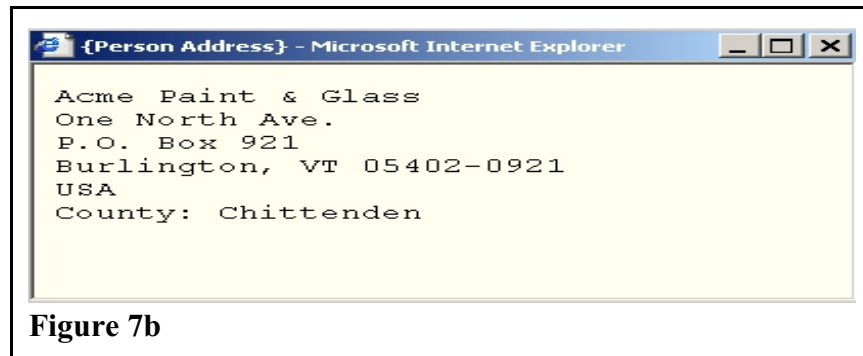
Party search results

Acme Mortgage.
Acme Paint & Glass.

Figure 7a

Your name search may find more than one record having the same name. Clicking on each of the names will display a window showing

the party's address information for verification. (Figure 7b)



Do not worry if your name appears on this list, but at an incorrect address. You can modify the address (for this case only) on the following Party Information screen. If the creditor was found, click [Select name from list] to continue.

Step 8: Party Information screen appears. (Figure 8).

MCECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Party Information

Acme Paint & Glass SSN:Unknown Tax Id

Office Address 1 PO Box 55555

Address 2 Address 3

City Burlington State VT Zip 05402-05555

County Chittenden Country USA

Phone Fax

E-mail

ProSe no Role Creditor (cr:cr)

Party text

Submit Cancel Clear

Figure 8

Insert or modify your address.

Note: Be sure to change the Role from Debtor to Creditor.

Click [Submit].

Step 9: Select the Party screen appears. (Figure 9).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select the Party:

Acme Paint & Glass, [cr:cr] (8755:1)
Canney, John R. III [tr:tr]
Engelberth Construction, Inc. [pty:cr]
Gould, Jason [pty:db]

[Add/Create New Party](#)

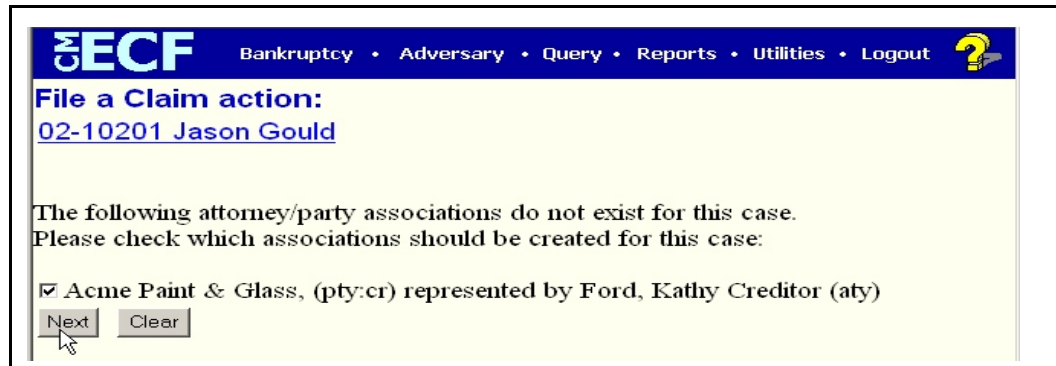
Next Clear

Figure 9

The name of the creditor you just added will be highlighted.

Click [Next].

Step 10: Attorney Association screen displays (Figure 10)



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

The following attorney/party associations do not exist for this case.
Please check which associations should be created for this case:

☒ Acme Paint & Glass, (pty:cr) represented by Ford, Kathy Creditor (aty)

Next Clear

Figure 10

Check the box, to establish yourself as counsel of record for the party.

This box appears the first time you file a document on behalf of a client in a particular case. You will not have to repeat this step in subsequent filings.

Step 11: The PDF document screen displays. (Figure 11a).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select the **pdf** document (for example: CA199cv501-21.pdf).

Filename
[Text Field] [Browse...]

Attachments to Document: ☒ No ☐ Yes

[Next] [Clear]

Figure 11a

Click [Browse], then navigate to the directory where the appropriate PDF file is located and select it with your mouse.

To make certain you are about to associate the correct claim file for this entry, right click on the filename with your mouse and select Open. (See Figure11b.)

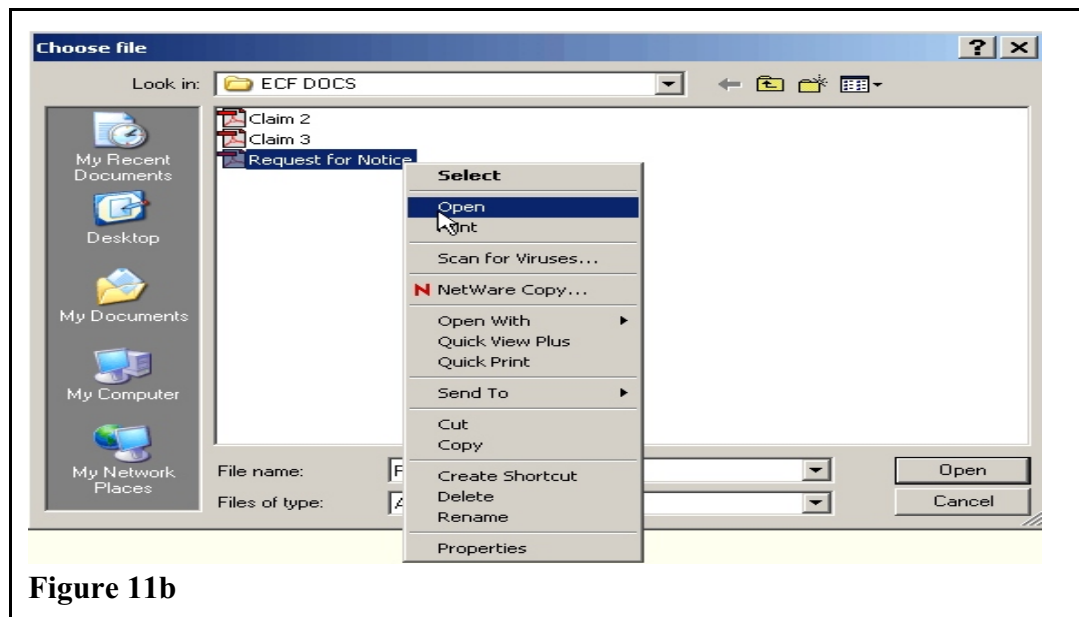


Figure 11b

This will launch the Adobe Acrobat Reader to display the image of the claim. Verify that it is correct.

Close or minimize the Adobe application after verifying the file, then click on the Open button on the File Upload dialogue box. (See Figure 11c.)

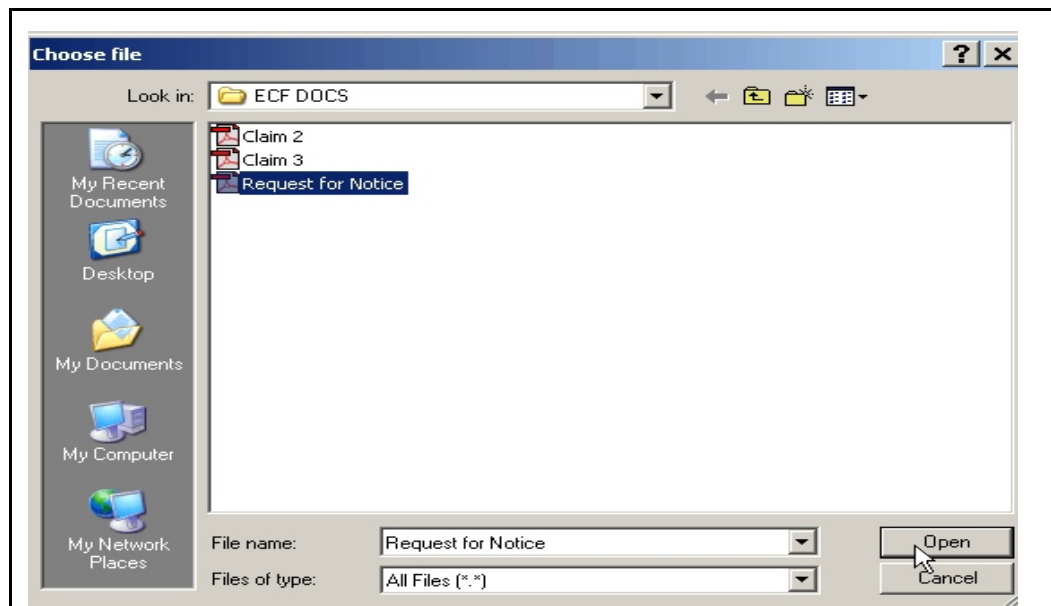


Figure 11c

The PDF Document screen will reappear displaying the complete path of the associated PDF document that was selected. (Figure 11d).

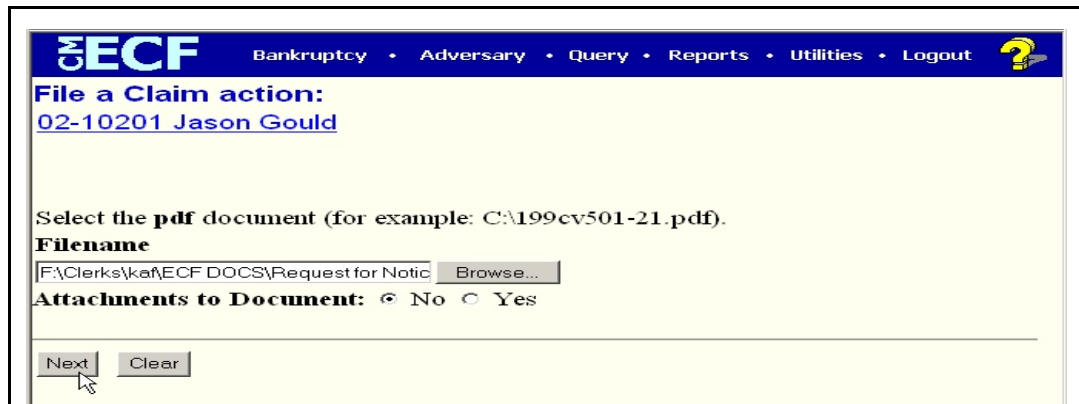


Figure 11d

Click [Next]

Step 12: Modify Docket Text Box is displayed (Figure 12).

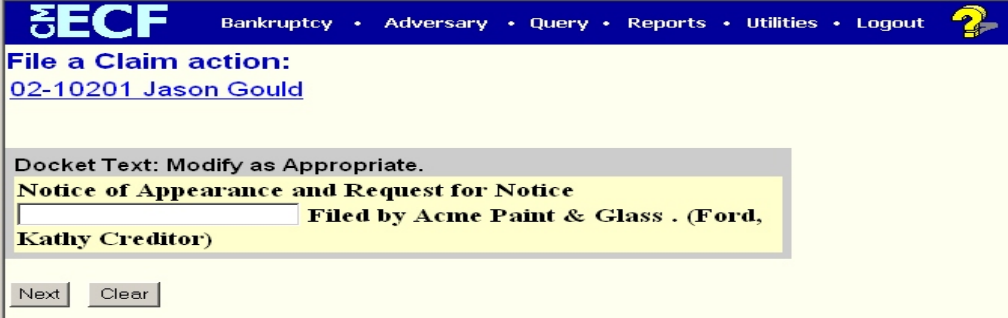


Figure 12

If appropriate, enter any necessary text in the free text box. This is usually not necessary.

Click [Next].

Step 13: The FINAL TEXT EDITING screen will display next (Figure 13)

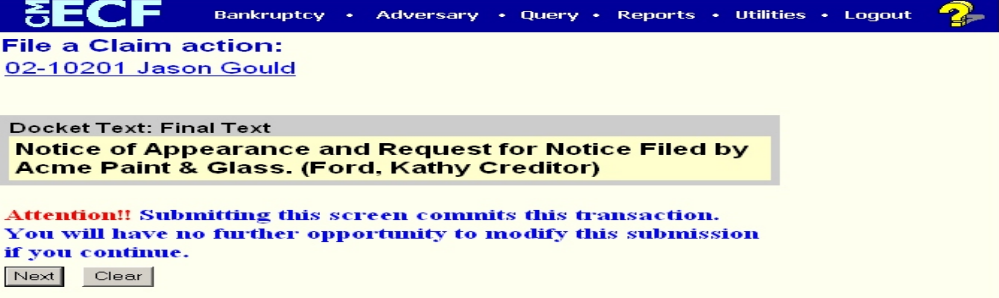


Figure 13

Carefully verify the final docket text. This is your last chance to change this entry before it becomes an official part of the case record.

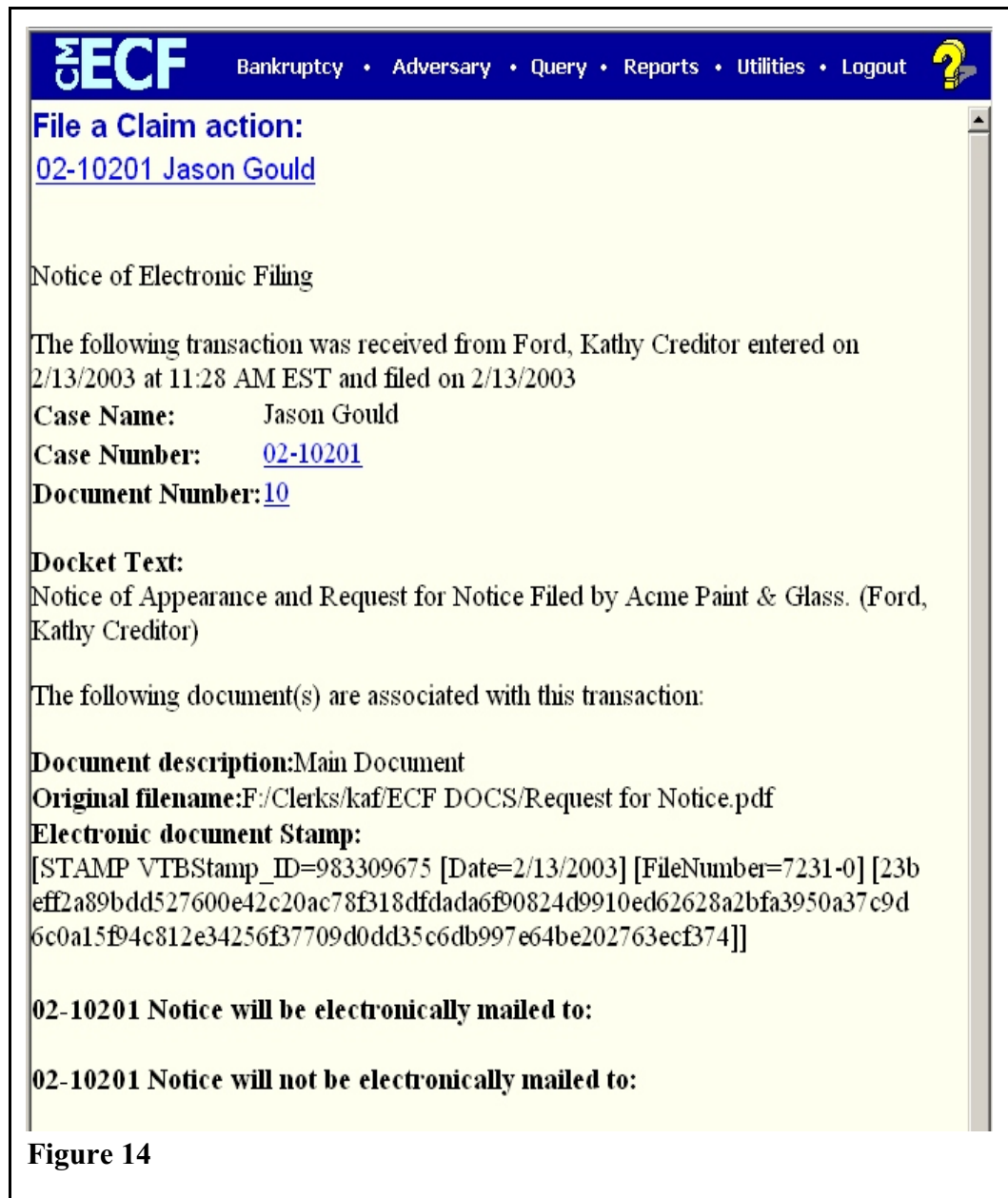
If the final docket text is incorrect:

Click the browser [Back] button to find the screen to be modified.

To abort or restart the transaction, click the Bankruptcy hypertext link on the Menu Bar.

If correct, click [Next].

Step 14 Notice of Electronic Filing Screen Displays (Figure 14).

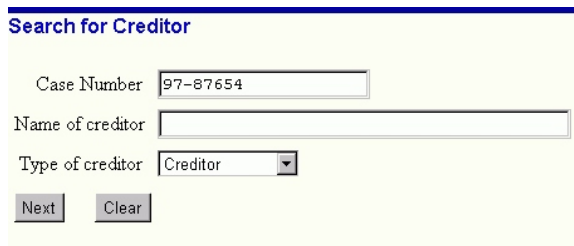


How to File a Proof of Claim

In preparing a proof of claim in PDF format, review the instructions in “How to Convert a Document to PDF

Prepare the proof of claim and format it as a PDF document. If the proof of claim amends a proof of claim already filed, review the claims register to determine the claim number of the proof of claim being amended, which is useful information to be entered when filing the claim. The filing process is relatively straight forward.

- Step 1** After entering the CM/ECF Document Filing System, select Bankruptcy from the blue menu bar.
- Step 2** Select File Claims from the menu.
- Step 3** Enter the case number of the case in which you are filing a proof of claim, as shown in Figure 1. Do not type in the name of a creditor and do not change the Type of creditor field. Click on “next.”



Search for Creditor

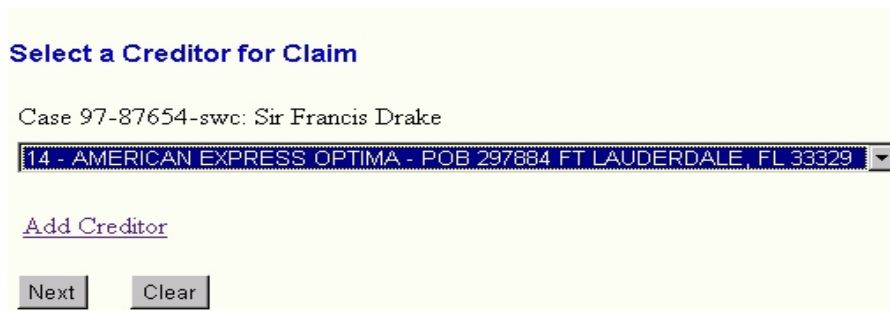
Case Number

Name of creditor

Type of creditor

Figure 1

- Step 4** The next screen is shown in Figure 2. First, examine the Debtor's name to the right of the case number to be sure you have selected the correct case. If the name of the Debtor is incorrect, click the Back button and re-enter the case number. If the case is the one desired, click on the down arrow ▼ to reveal the list of creditors, which is derived from the creditor mailing matrix. That a creditor's name appears on the list does not mean that the creditor has filed a proof of claim.



Select a Creditor for Claim

Case 97-87654-swc: Sir Francis Drake

14 - AMERICAN EXPRESS OPTIMA - POB 297884 FT LAUDERDALE, FL 33329 ▼

[Add Creditor](#)

Next Clear

Figure 2

- Step 5** Scroll down the list, as shown in Figure 3, to determine if creditor for which the proof of claim is to be filed is on the list. Names on the list are in alphabetical order by the first names of the creditors. This means that Joe Smith will appear under “J,” not “S.” If the creditor for which you wish to file a proof of claim is on the list, click on that name in the drop-down list. Like suitcases on an airport carousel, creditor names are often similar, so that it is important not to jump at the first appearance of a name without reviewing the entire list.

Because the list is generated in large part from the mailing matrix filed by the Debtor, the address for a particular creditor may not be the one the creditor prefers for notices and distributions with respect to a proof of claim. Nonetheless, if you are sure that the creditor is on the list, select the creditor even if the name or address is incorrect. You will have an opportunity to have corrections made by making a notation to that effect on a subsequent screen as explained below in Step 8. After highlighting the creditor, click on Next and proceed to Step 7.

If the creditor's name is not on the list, click on a blank part of the

screen to collapse the pull-down list to return to the screen as it appears in Figure 2, and then click on “Add Creditor.” Then proceed to Step 6.

Select a Creditor for Claim

Case 97-87654-swc: Sir Francis Drake

14 - AMERICAN EXPRESS OPTIMA - POB 297884 FT LAUDERDALE, FL 33329
14 - AMERICAN EXPRESS OPTIMA - POB 297884 FT LAUDERDALE, FL 33329
15 - AT&T UNIVERSAL CARD - POB 44167 JACKSONVILLE, FLA 32231
13 - CHING CHIHHSIEH WILSON - 860 10TH AVENUE NEW YORK, NY
12 - DONALD G. WILSON - 860 10TH AVENUE NEW YORK, NY
16 - FIRST USA MASTERCARD - POB 8650 WILMINGTON DE 19889
17 - GM CARD - POB 80082 SALINAS, CA 93912-0082
18 - HOUSEHOLD FINANCE CARD - 15 MAIDEN LANE NEW YORK, NY 10038
19 - MBNA AMERICA - POB 15026 WILMINGTON, DE 19850
2635 - Second National Bank - 123 Main Street Anytown, Georgia 30305

Figure 3

Step 6 If the creditor is not in the pull-down list, clicking on “Add Creditor” will take you to the screen shown in Figure 4. Be sure the case number is correct and click on Next.

Creditor Processing

Case Number

97-87654	99-12345, 1-99-bk-12345 or 1-99-bk-12345
----------	--

Next Clear

Figure 4

The screen shown in Figure 5 will appear.

Add Creditor(s)

Case 97-87654-swc already contains creditors!

Case number 97-87654-swc Sir Francis Drake

Name

Address 1

Address 2

Address 3

Address 4

Address 5

Type

Creditor committee ☒ No ☐ Yes

☒ Continue To Enter ☐ Last Entry

Figure 5

Check the case name just above the field for the creditor’s name to be sure that the case number was entered correctly on the previous screen. Fill out the address form, taking care to spell the name of the creditor correctly, including correct capitalization and to enter the correct address, which should be the address shown in the section of the proof of claim labeled “Name and address where notices should be sent.” Do not change the Type field, which defaults to “Creditor” or the Creditor committee field which defaults to “no.” However, you must click on the radio button to the left of “Last Entry.” If you forget you will get another screen that looks like the one in Figure 5 (without the blanks filled in). In that event, click on the Back button and then click on the Last Entry radio button. Double check the information and if correct, click on Next, which will take you to the screen shown in Figure 6, which will confirm that one creditor has been entered and is to be added to the creditor list.

Add Creditor(s)

Total Creditors Entered 1

Figure 6

Click the Submit button shown in Figure 6 to add the creditor. On the Creditor Receipt screen shown in Figure 7, click on “File a proof of claim.” You will then be returned to the screen shown in Figure 1. Proceed as indicated in Step 3. The creditor you added will be in the pull-down list on the screen shown in Figure 3. After selecting the creditor, as indicated in Step 5, you will reach Step 7.

Creditors Receipt	
Case Number	97-87654
Total Creditors Added to Database	1
File A Proof Of Claim	
Return To Creditor Maintenance Menu	

Figure 7

Step 7 The next screen is shown in Figure 8. If the claim amends a previously filed claim, type in the earlier claim number in the “Amends Claim” box on the first line. Change “Filed By” selection to “Attorney” or “Creditor” as appropriate. Do not make any change in the, Late and Status fields. Enter the amounts of the claim broken down by type of claim, as shown on the proof of claim. The Total (Display Only) field will automatically total the amounts entered in the Unsecured, Secured and Priority Fields, and the Total should equal the amount of the claim on the petition date shown in section 4 of Official Form 10 (the proof of claim form). If the priority portion of the claim is secured in whole or in part, do not augment the secured portion in the Secured field, which should be limited to non-priority secured claims. You may note in the Remarks field at the bottom that some or all of the priority claim is secured. If the name or address shown at the top of the information form is

incorrect or incomplete, add the words **CORRECTION** in solid caps at the beginning of the Remarks field. Make sure that on the proof of claim form, the corrected name and/or address is shown in the section labeled “Name and address where notices should be sent” and check the box adjacent to the words “Check box if address differs . . .” Double check the information you have provided, and when correct, click on Next.

Proof Of Claim Information For				
3942 - Dot Com, Inc. 123 Internet Blvd. Firewire, Ga. 30099				
Case Number: 97-87654-swc	Claim No:	Amends Claim #: <input type="text"/>	Duplicates Claim #: <input type="text"/>	Filed By: Creditor <input type="text"/>
Last Date To File: 02/02/1999	Last Date To File(Govt): 01/28/1999	Date Filed: 04/25/2001	Late: No <input type="text"/>	Status: <input type="text"/>
Amount Claimed				
Unsecured <input type="text"/>	Secured <input type="text"/>	Priority <input type="text"/>	Unknown <input type="text"/>	Total (Display Only) <input type="text"/>
Amount Allowed				
				Total (Display Only) <input type="text"/>
Description:	<input type="text"/>			
Remarks:	<input type="text"/>			
<input type="button" value="Next"/> <input type="button" value="Clear"/>				

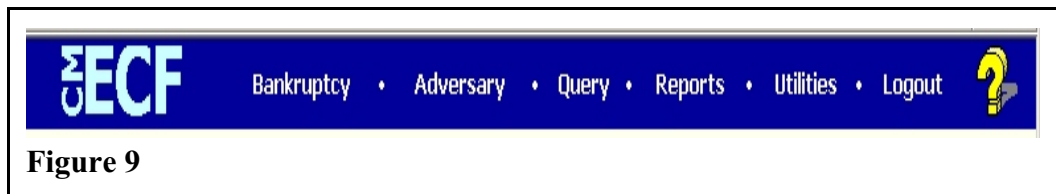
Figure 8

Step 8 The next screen is the [Choose Main PDF File Routine](#). Browse and select the PDF document that is the proof of claim. Add attachments if necessary. **THIS IS THE LAST SCREEN BEFORE THE PROOF OF CLAIM WILL BE FILED.** Click on Next to file the proof of claim. The following and last screen will be the [Notice of Electronic Filing Routine](#).

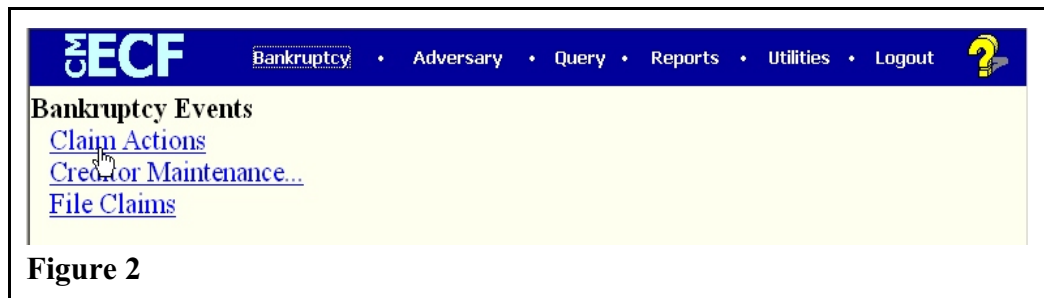
TRANSFER OF CLAIMS

Note: Filing a Transfer of Claims or a Joint Notice of Transfer of Claims is a two part process. First you must file the Notice on the court docket sheet, then you must file the same notice a second time as an Amended Proof of Claim amending the proof of claim previously filed by the transferor. Both parts of this process are outlined below.

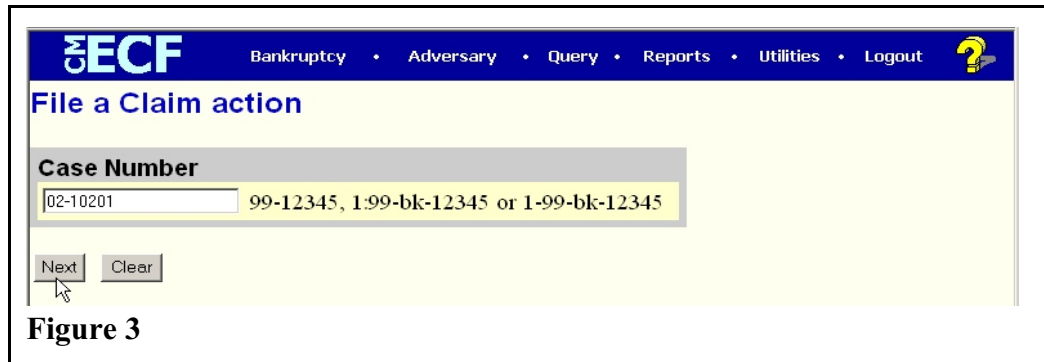
Step 1: Select Bankruptcy on Main menu (Figure 1).



Step 2: Select Claim Actions (Figure 2).



Step 3: Enter the Case Number (Figure 3).



The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below this is a yellow header area with the text 'File a Claim action'. The main content area is white and contains a 'Case Number' label above a text input field. The input field contains the text '02-10201'. To the right of the input field is a hint text: '99-12345, 1:99-bk-12345 or 1-99-bk-12345'. Below the input field are two buttons: 'Next' and 'Clear'. A mouse cursor is pointing at the 'Next' button.

Figure 3

Click [Next].

Step 4: Select Event (Figure 4).



The screenshot shows the ECF interface after clicking 'Next'. The 'Case Number' field now displays '02-10201 Jason Gould'. Below this is a dropdown menu for selecting an event. The dropdown menu is open, showing three options: 'Expungement/Withdrawal of Claim', 'Request for Notice - Creditor', and 'Transfer of Claim'. The 'Transfer of Claim' option is highlighted. Below the dropdown menu are 'Next' and 'Clear' buttons. A mouse cursor is pointing at the 'Transfer of Claim' option.

Figure 4

**Select Transfer of Claim
Click [Next]**

Step 5: Select the Party screen appears (Figure 5).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#) CASE CLOSED on 06/20/2002

Select the Party:

Canney, John R. III [tr:tr]
Gould, Jason [pty:db]

[Add/Create New Party](#)

Next Clear

Figure 5a

A list of all parties who have appeared in the case displays.

Note: Even if your client is a creditor who has previously filed a claim, it usually will not appear on this list. The only parties that appear on this list are those who have filed a notice of appearance, or a pleading (motion or responsive pleading).

If your client is listed, click the creditor's name to highlight it, Then click [Next]. Proceed to step

If your client is not listed, click on "[Add/Create New Party](#)".

Step 6: Search for a Party Screen Appears (Figure 6).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Search for a party

SSN Tax Id

Last/Business name

Search Clear

Figure 6

This screen allows you to search the court's database of all parties who have ever appeared in any case at any time. You usually will appear in this list.

The [Search for A Party Routine](#) requires searching the master party file to determine if the party to be added is listed in that file. The most effective way to search for creditors in the database is to search by name.

To search by name, type the first few letters of a last name or a company name in the field labeled "Last/Business Name." You must type at least two letters, but the more letters typed, the smaller the resulting list will be. For example, typing "Sm" will retrieve Smith, Smithe, Smithers, etc. The party search mechanism is case sensitive so that names must be capitalized. Type "sm" instead of "Sm" and the search result will be: "No person found."

Step 7: The Party Search Results screen is displayed (Figure 7a).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Search for a party

SSN Tax Id

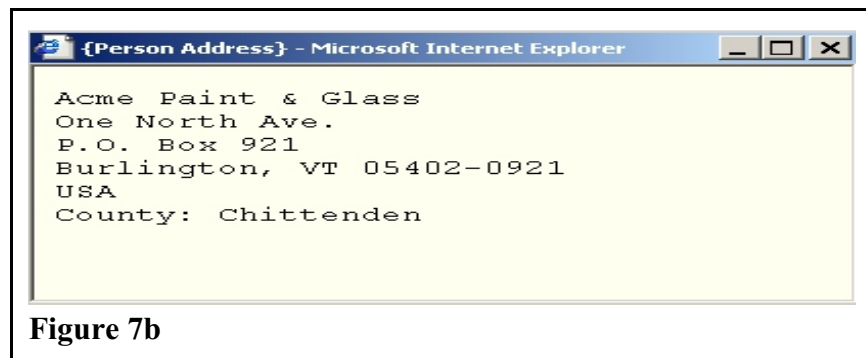
Last/Business name

Party search results

Acme Mortgage.
Acme Paint & Glass.

Figure 7a

Your name search may find more than one record having the same name. Clicking on each of the names will display a window showing the party's address information for verification. (Figure 7b)



Do not worry if your name appears on this list, but at an incorrect address. You can modify the address (for this case only) on the following Party Information screen. If the creditor was found, click [Select name from list] to continue.

Step 8: Party Information screen appears. (Figure 8).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Party Information

Acme Paint & Glass SSN:Unknown Tax Id

Office Address 1

Address 2 Address 3

City State Zip

County Country

Phone Fax

E-mail

ProSe Role

Party text

Figure 8

Insert or modify your address.

Note: Be sure to change the Role from Debtor to Creditor.

Click [Submit].

Step 9: Select the Party screen appears. (Figure 9).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select the Party:

Acme Paint & Glass, [cr:cr] (8755:1)
Canney, John R. III [tr:tr]
Engelberth Construction, Inc. [pty:cr]
Gould, Jason [pty:db]

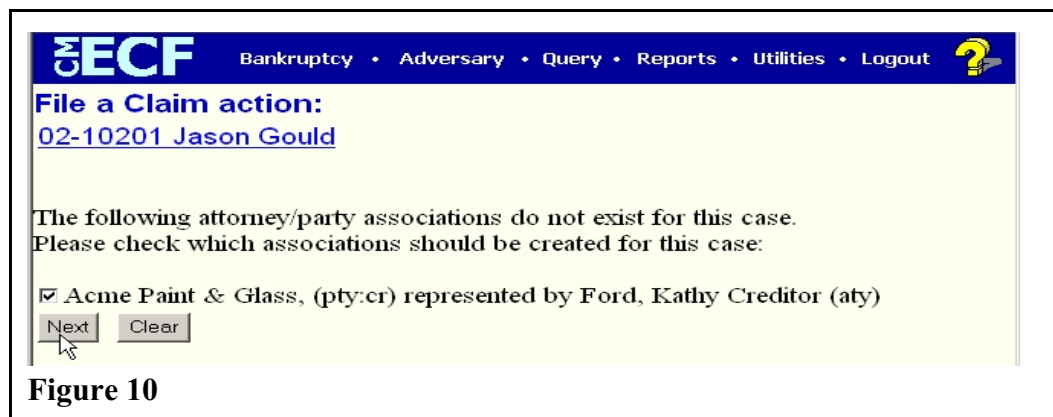
[Add/Create New Party](#)

Figure 9

The name of the creditor you just added will be highlighted.

Click [Next].

Step 10: Attorney Association screen displays (Figure 10)



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

The following attorney/party associations do not exist for this case.
Please check which associations should be created for this case:

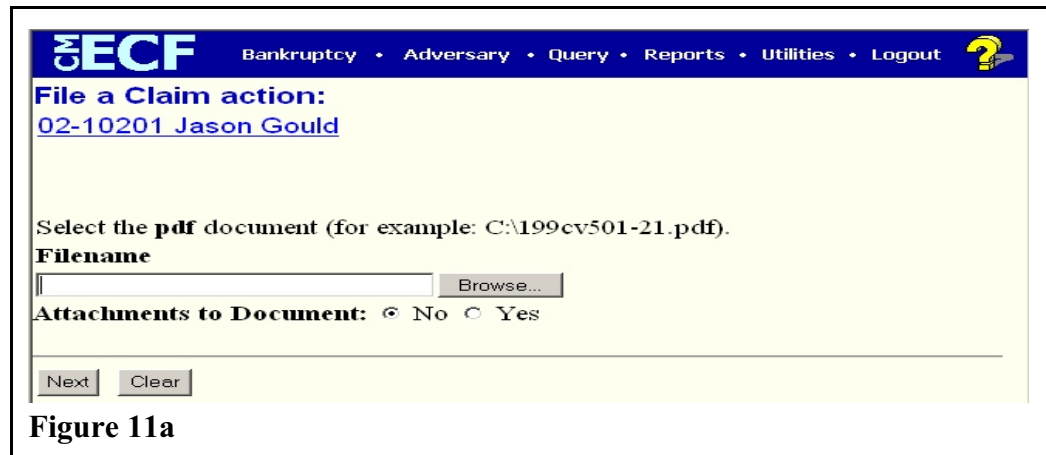
☒ Acme Paint & Glass, (pty:cr) represented by Ford, Kathy Creditor (aty)

Figure 10

Check the box, to establish yourself as counsel of record for the party.

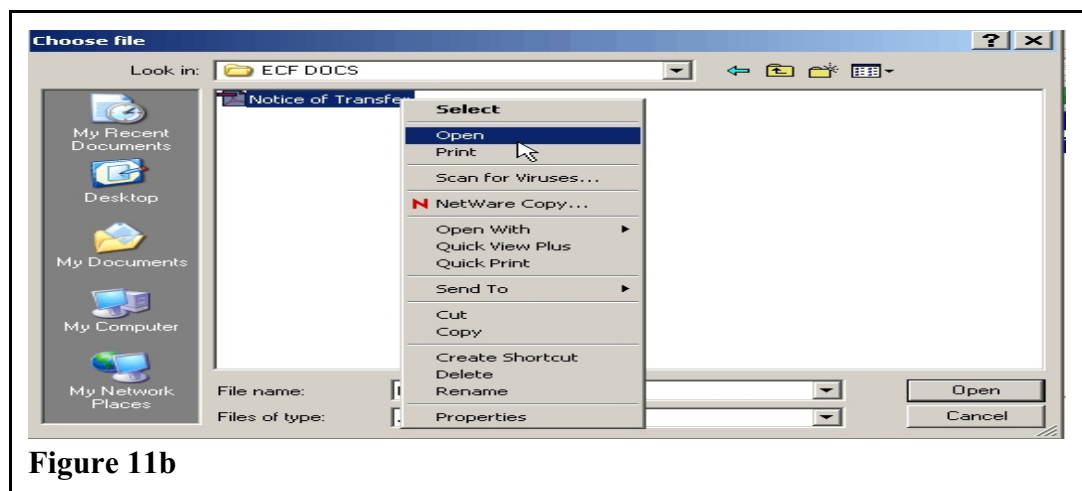
This box appears the first time you file a document on behalf of a client in a particular case. You will not have to repeat this step in subsequent filings.

Step 11: The PDF document screen displays. (Figure 11a).



Click [Browse], then navigate to the directory where the appropriate PDF file is located and select it with your mouse.

To make certain you are about to associate the correct claim file for this entry, right click on the filename with your mouse and select Open. (See Figure11b.)



This will launch the Adobe Acrobat Reader to display the image of the claim. Verify that it is correct.

Close or minimize the Adobe application after verifying the file, then click on the Open button on the File Upload dialogue box. (See Figure 11c.)

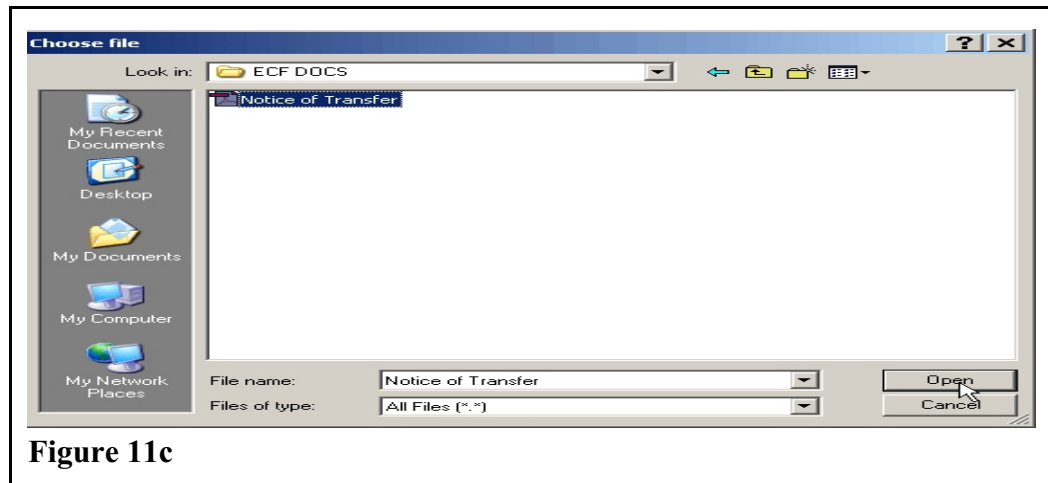


Figure 11c

The PDF Document screen will reappear displaying the complete path of the associated PDF document that was selected. (Figure 11d).

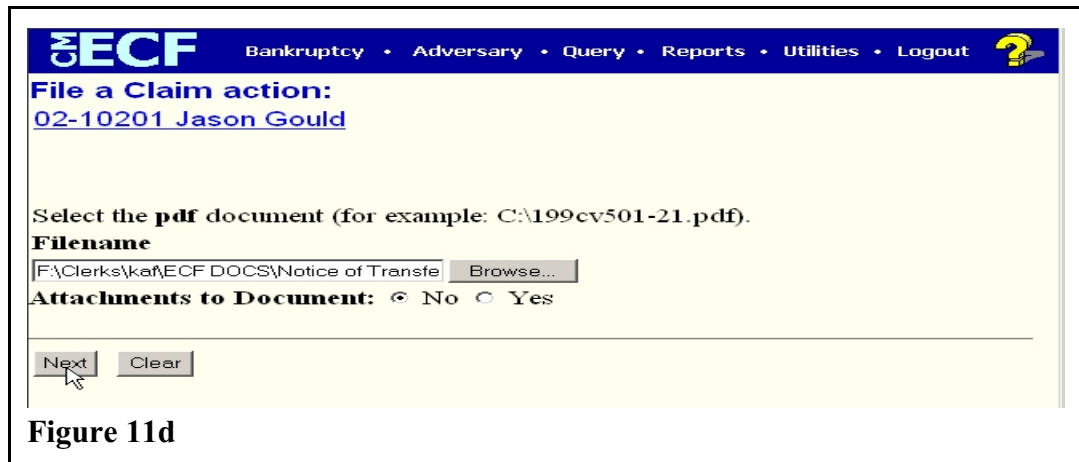


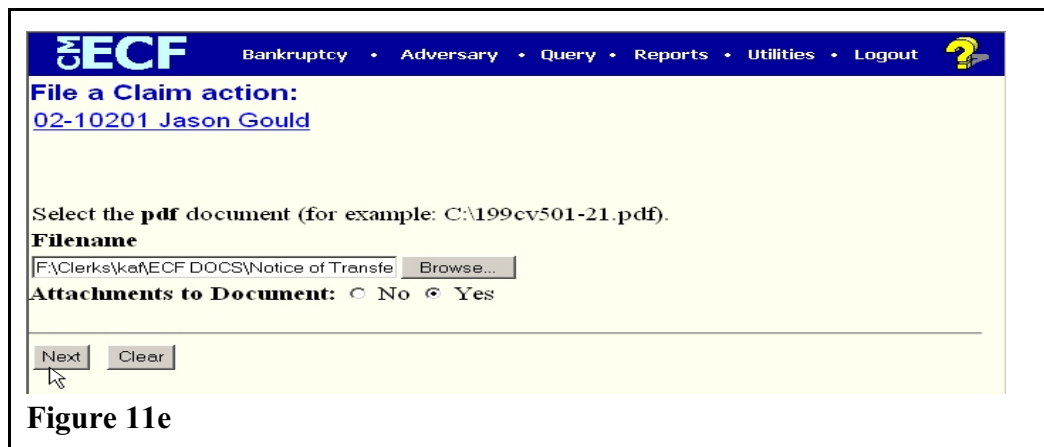
Figure 11d

If you are only filing one transfer of claim, Click [Next] and proceed to Step 12. If you are filing multiple notices, proceed to Step 11e.

Step 11e: Attachments to Document. (Figure 11e).

Some creditors file multiple notices of transfer of claims in the same case.

If you are doing so, often you will have a separate document for each claim being transferred. You may file these all at the same time. To attach additional documents, Click the Yes radio button at the right of the Attachments to Document prompt. (Figure 11e).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename
F:\Clerks\ka\ECF DOCS\Notice of Transfe Browse...

Attachments to Document: ☐ No ☒ Yes

Next Clear

Figure 11e

Click [Next]

Step 11f: The ATTACHMENT screen displays. (Figure 11f).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select one or more attachments.

1) Enter the **pdf** document that contains attachment (for example: C:\appendix.pdf).
Filename

2) Select a document type and/or enter a description.
Type **Description**

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

Figure 91f

There are three steps to the attachment process:

- (1) Click [Browse], then navigate to the drive and directory where the appropriate PDF file for the proposed order is located and select it with your mouse.**

To make certain you are about to associate the correct PDF file for this entry, right click on the filename with your mouse and select Open (figure 11g). This will launch the Adobe Acrobat Reader to display the contents of the imaged document.



Figure 11g

Verify that the document is correct. Close or minimize the Adobe Acrobat by clicking on the control box in the upper right hand corner of the window.

You will return to the Chose file window (figure 11c). Click [Open].

- 2) Select Transfer of claim as the attachment type from the drop down list. (Figure 11h). You are not required to fill in the Description box, but you may include a more specific identification, such as "Claim #2", if you wish.

File a Claim action:

02-10201 Jason Gould

Select one or more attachments.

1) Enter the **pdf** document that contains attachment (for example: C:\appendix.pdf).

Filename

F:\Clerks\kat\ECF DOCS\Claim 2.pdf

Browse...

2) Select a document type and/or enter a description.

Type

Description

<ul style="list-style-type: none"> Index List of 20 Largest Creditors Notice of Hearing Notice of Motion Notice of Motion under Default Proposed Order Revision Schedule Supplement Transfer of Claim Volume(s) 	<input type="text"/>
---	----------------------

st box below. If you have more attachments, go back to names is complete, click on the Next button.

Figure 11h

- 3) You must click [Add to List]. The path and file name are added to the List box. (See Figure 11i.)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select one or more attachments.
1) Enter the **pdf** document that contains attachment (for example: C:\appendix.pdf).
Filename

2) Select a document type and/or enter a description.
Type **Description**

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

Figure 91i

It is possible to add multiple transfers of claim at this time by repeating steps 1 through 3 on this screen.

Once all attachments have been added to this list, Click [Next] to continue

Step 12: File a Claim Action screen displays. (Figure 12a).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Transfer Type ☐ 3001 (e) 1 ☒ 3001 (e) 2 ☐ 3001 (e) 3 ☐ 3001 (e) 4

Transferred To:	Acme Paint & Glass		
Transferred From:	Acme Siding		
Claim Number:	10	Amount: \$	10,202.00
Transferred From:	Acme Roofing		
Claim Number:	14	Amount: \$	20,000.00
Transferred From:			
Claim Number:		Amount: \$	
Transferred From:			

Figure 92a

Fill in the information.

First, select the radio button in front of the appropriate transfer type. In Figure 12a the transfer type is 3001(e) 2. Note the radio button selected is the one that precedes 3001(e)2.

In the Transferred To box, type your name.

In the Transferred From box, type the name of the party who is transferring the claim to you.

In the Claim Number box, type the number of the proof of claim for

the claim being transferred. If you do not know the claim number, refer to section of this manual for instructions on how to view the claims register.

If multiple claims are being transferred, continue listing the claims in this manner.

Leave the box next to the question: Does this filing refer to an existing document in this case unchecked. (Figure 12b).

The screenshot shows the ECF (Electronic Case Filing) interface for Bankruptcy Adversary. The top navigation bar includes links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area contains a table for transferring claims. The table has three columns: 'Transferred From', 'Claim Number', and 'Amount: \$'. The first two rows are populated with data: 'Acme Siding' with claim number '10' and amount '\$10,202.00', and 'Acme Roofing' with claim number '14' and amount '\$20,000.00'. The remaining rows are empty. Below the table, there is a checkbox labeled 'Does this filing refer to an existing document in this case? (If yes, click on the box)'. A note below the checkbox states: 'NOTE: If the event you are docketing is an answer/response, you will be prompted on a subsequent screen for its related motion. Therefore, do not click on this box to establish a relationship to the motion you are answering.' At the bottom of the form, there are 'Next' and 'Clear' buttons.

Transferred From:	Claim Number:	Amount: \$
Acme Siding	10	10,202.00
Acme Roofing	14	20,000.00

☐ Does this filing refer to an existing document in this case? (If yes, click on the box)
NOTE: If the event you are docketing is an answer/response, you will be prompted on a subsequent screen for its related motion. Therefore, do not click on this box to establish a relationship to the motion you are answering.

Next Clear

Figure 12b

You will create a relationship to the previously filed proof of claim when you file this as an amended claim (Step 16 Below).

Click [Next].

Step 13: Modify Docket Text Box is displayed (Figure 13).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Docket Text: Modify as Appropriate.

Transfer of Claim. Transfer Agreement 3001
(e) 2 Transferors:Acme Siding(Claim No.10, Amount
10,202.00); Acme Roofing(Claim No.14, Amount 20,000.00)
To Acme Paint & Glass Filed by Acme Paint & Glass .
(Attachments: # (1) Transfer of Claim)(Ford, Kathy Creditor)

Figure 13

If appropriate, choose a prefix such as *Joint* from the Prefix pick list.

Click [Next] to continue.

STEP 14 The FINAL TEXT EDITING screen will display next (Figure 14)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Docket Text: Final Text

**Joint Transfer of Claim. Transfer Agreement 3001 (e) 2
Transferors:Acme Siding(Claim No.10, Amount
10,202.00); Acme Roofing(Claim No.14, Amount
20,000.00) To Acme Paint & Glass Filed by Acme Paint
& Glass. (Attachments: # (1) Transfer of Claim)(Ford,
Kathy Creditor)**

**Attention!! Submitting this screen commits this transaction.
You will have no further opportunity to modify this submission
if you continue.**

Figure 14

Carefully verify the final docket text. This is your last chance to change this entry before it becomes an official part of the case record.

Note the description and hyperlink to the attached transfer of claim .

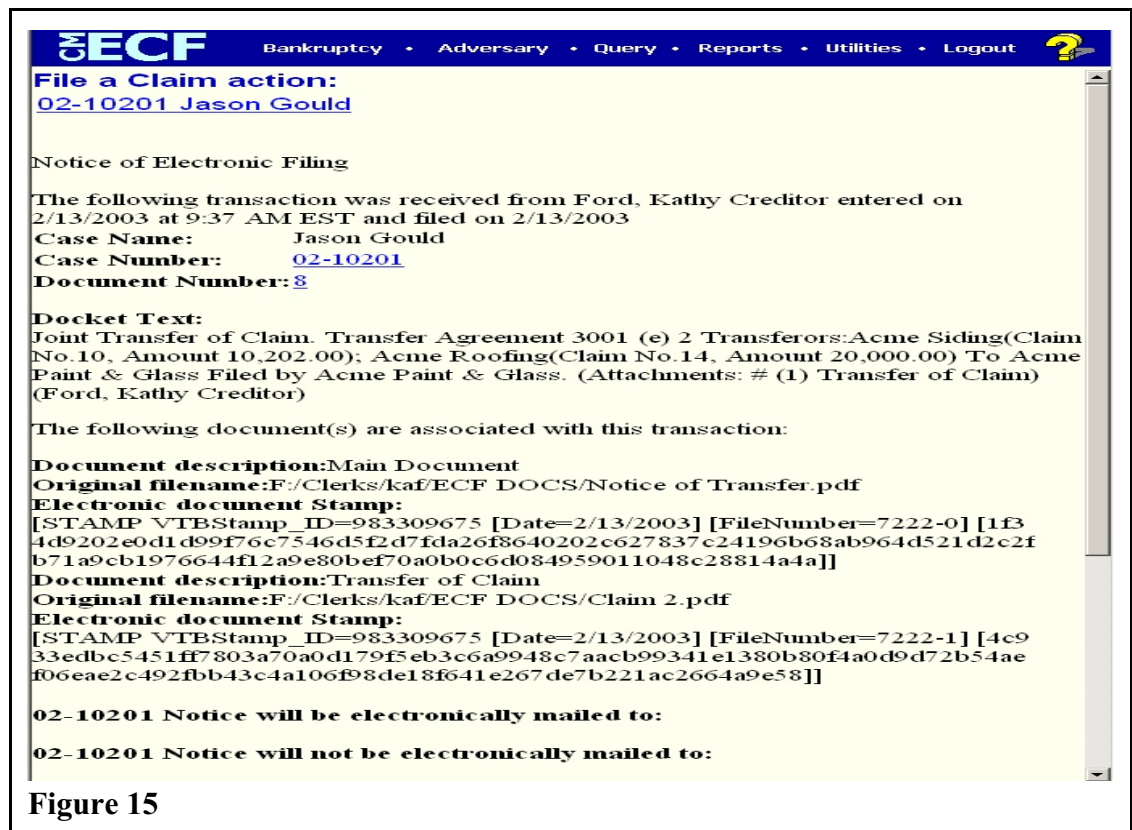
If the final docket text is incorrect:

Click the browser [Back] button to find the screen to be modified.

To abort or restart the transaction, click the Bankruptcy hypertext link on the Menu Bar.

If correct, click [Next].

STEP 15 The NOTICE OF ELECTRONIC FILING SCREEN will be generated. (Figure 15).



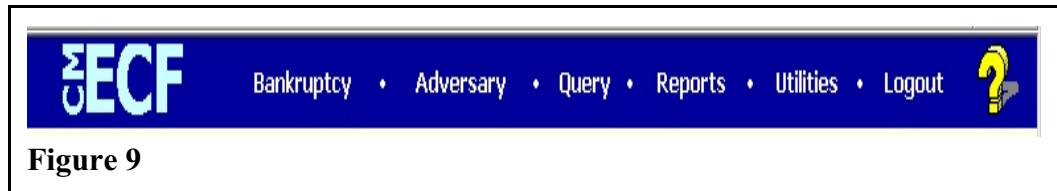
Step 16: File Amended Proof of Claim

See Section 5 of this manual for instructions on how to file a proof of claim.

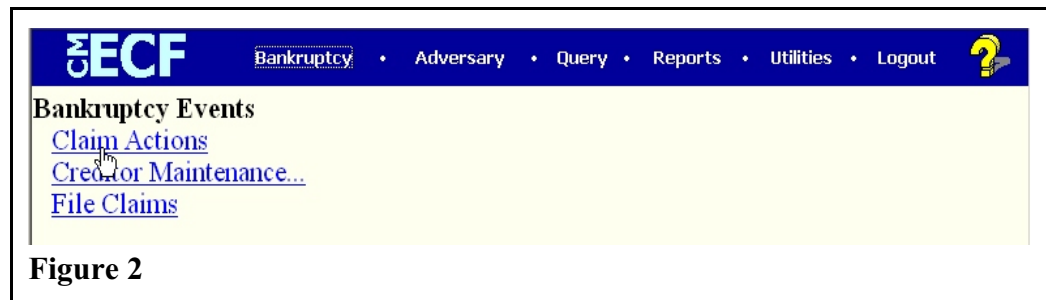
Be sure when entering the claim information in Step 6 the you enter the earlier claim number in the “Amends Claim” box, and type in the words “Notice of Transfer of Claim” in the “Description box.

Withdrawal of Claims

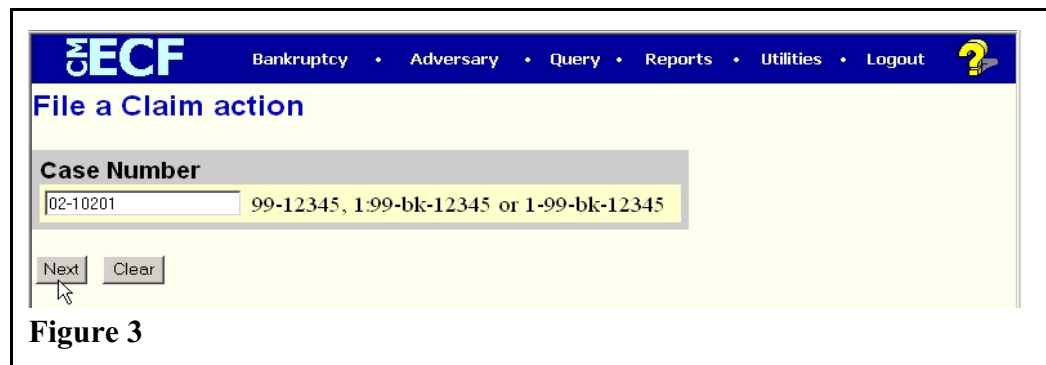
Step 1: Select Bankruptcy on Main menu (Figure 1).



Step 2: Select Claim Actions (Figure 2).



Step 3: Enter the Case Number (Figure 3).



Click [Next].

Step 4: **Select Event** (Figure 4).



Figure 4

Select Expungement/Withdrawal of Claim

Click [Next]

Step 5: **Select the Party** screen appears (Figure 5).



Figure 5a

A list of all parties who have appeared in the case displays.

Note: Even if your client is a creditor who has previously

filed a claim, it usually will not appear on this list. The only parties that appear on this list are those who have filed a notice of appearance, or a pleading (motion or responsive pleading).

If your client **is** listed, click the creditor's name to highlight it, Then click [Next]. Proceed to step 11.

If your client **is not** listed, click on "[Add/Create New Party](#)".

Step 6: Search for a Party Screen Appears (Figure 6).

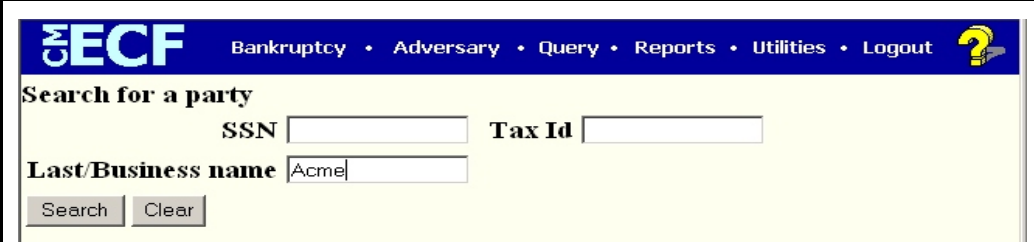
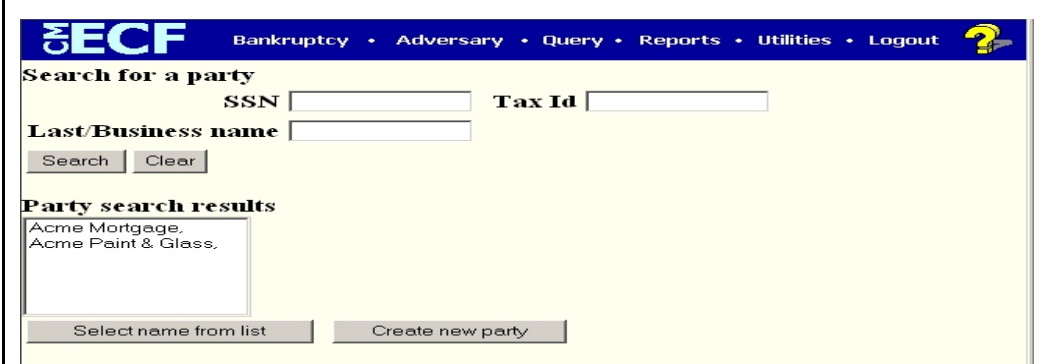


Figure 6

This screen allows you to search the court's database of all parties who have ever appeared in any case at any time. You usually will appear in this list.

The [Search for A Party Routine](#) requires searching the master party file to determine if the party to be added is listed in that file. The most effective way to search for creditors in the database is to search by name. To search by name, type the first few letters of a last name or a company name in the field labeled "Last/Business Name." You must type at least two letters, but the more letters typed, the smaller the resulting list will be. For example, typing "Sm" will retrieve Smith, Smithe, Smithers, etc. The party search mechanism is **case sensitive** so that **names must be capitalized**. Type "sm" instead of "Sm" and the search result will be: "No person found."

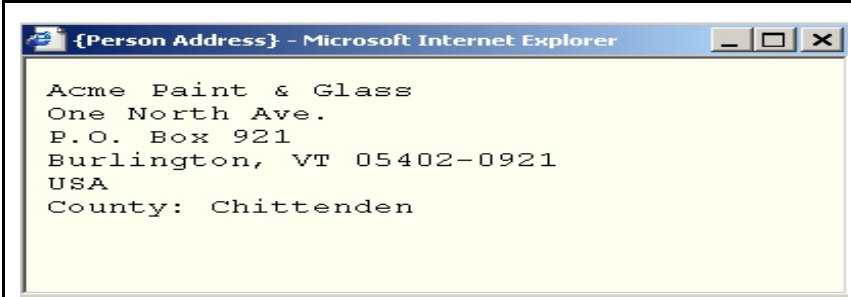
Step 7: The Party Search Results screen is displayed (Figure 7a).



The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar is a search section titled "Search for a party". It contains three input fields: "SSN", "Tax Id", and "Last/Business name". There are "Search" and "Clear" buttons below the "Last/Business name" field. Below the search section is a "Party search results" section. It contains a list box with two entries: "Acme Mortgage." and "Acme Paint & Glass.". Below the list box are two buttons: "Select name from list" and "Create new party".

Figure 7a

Your name search may find more than one record having the same name. Clicking on each of the names will display a window showing the party's address information for verification. (Figure 7b)



The screenshot shows a Microsoft Internet Explorer window titled "{Person Address} - Microsoft Internet Explorer". The window displays the following address information:

Acme Paint & Glass
One North Ave.
P.O. Box 921
Burlington, VT 05402-0921
USA
County: Chittenden

Figure 7b

Do not worry if your name appears on this list, but at an incorrect address. You can modify the address (for this case only) on the following Party Information screen. If the creditor was found, click [Select name from list] to continue.

Step 8: Party Information screen appears. (Figure 8).

MECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Party Information

Acme Paint & Glass SSN:Unknown Tax Id

Office Address 1 PO Box 55555

Address 2 Address 3

City Burlington State VT Zip 05402-05555

County Chittenden Country USA

Phone Fax

E-mail

ProSe no Role Creditor (cr:cr)

Party text

Submit Cancel Clear

Figure 8

Insert or modify your address.

Note: Be sure to change the **Role** from Debtor to **Creditor**.

Click [Submit].

Step 9: Select the Party screen appears. (Figure 9).



Figure 9

The name of the creditor you just added will be highlighted.

Click [Next].

Step 10: Attorney Association screen displays (Figure 10)

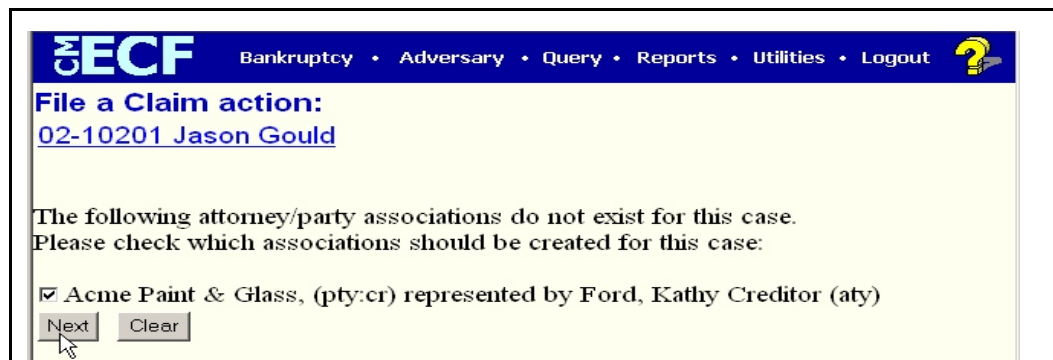
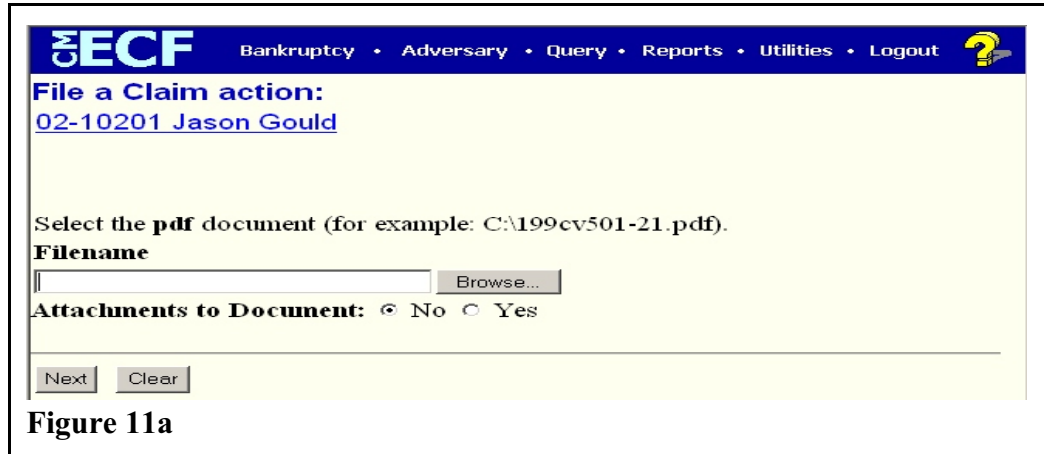


Figure 10

Check the box, to establish yourself as counsel of record for the party.
This box appears the first time you file a document on behalf of a client in

a particular case. You will not have to repeat this step in subsequent filings.

Step 11: The PDF document screen displays. (Figure 11a).



The screenshot shows the ECF (Electronic Case Filing) system interface. At the top, there is a blue header bar with the ECF logo on the left and navigation links: Bankruptcy • Adversary • Query • Reports • Utilities • Logout. A yellow question mark icon is on the right. Below the header, the page title is "File a Claim action:" followed by the case number "02-10201 Jason Gould". The main content area has a light yellow background. It contains the instruction "Select the pdf document (for example: C:\199cv501-21.pdf)." followed by the label "Filename". Below this is a text input field and a "Browse..." button. Underneath the input field is the label "Attachments to Document:" followed by two radio buttons: "No" (which is selected) and "Yes". At the bottom of the form are two buttons: "Next" and "Clear".

Figure 11a

Click [**Browse**], then navigate to the directory where the appropriate PDF file is located and select it with your mouse.

To make certain you are about to associate the correct claim file for this entry, right click on the filename with your mouse and select **Open**. (See Figure11b.)

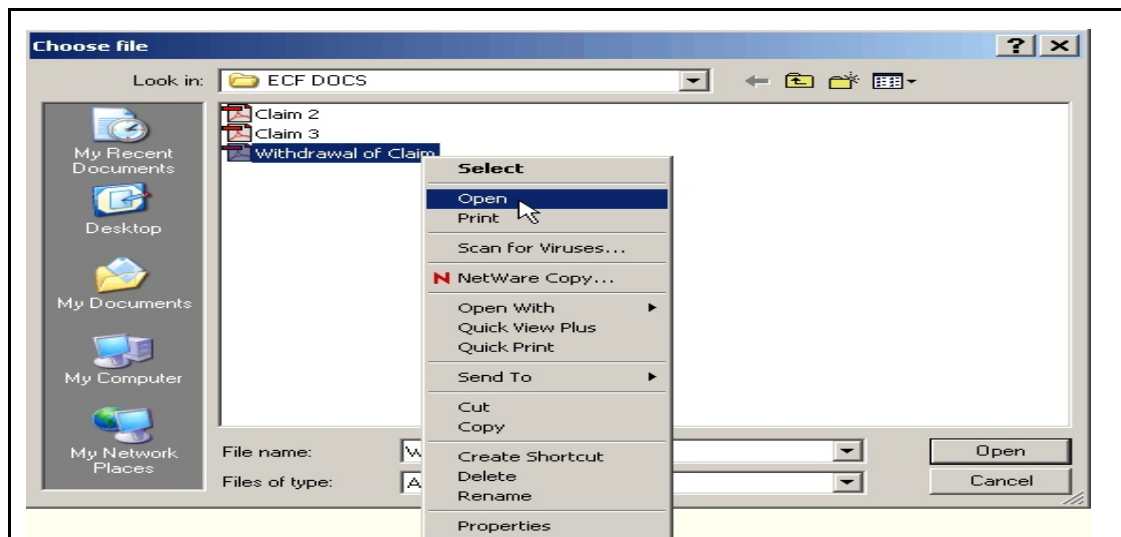


Figure 11b

This will launch the Adobe Acrobat Reader to display the image of the claim. Verify that it is correct.

Close or minimize the Adobe application after verifying the file, then click on the **Open** button on the File Upload dialogue box. (See Figure 11c.)

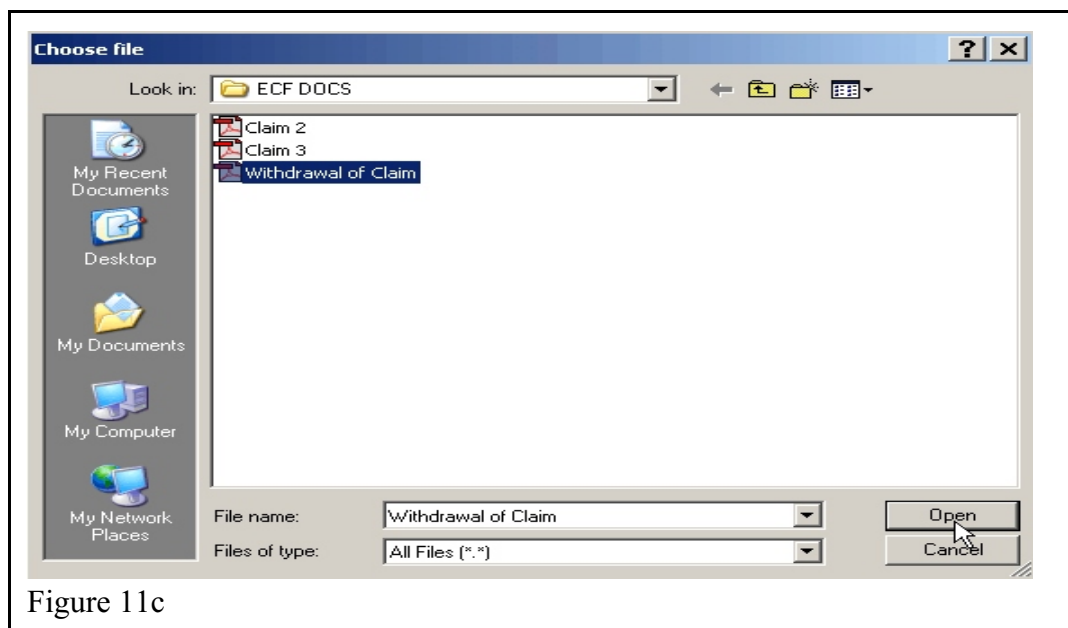
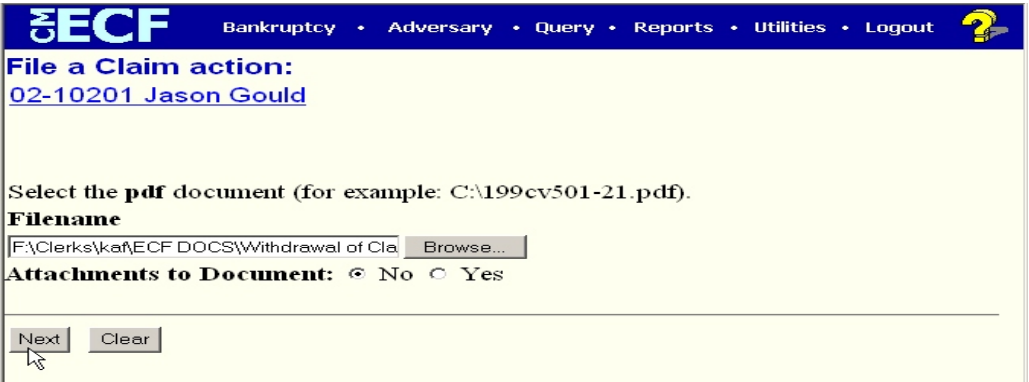


Figure 11c

The **PDF Document** screen will reappear displaying the complete path of the associated PDF document that was selected. (Figure 11d).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename
F:\Clerks\kat\ECF DOCS\Withdrawal of Cla

Attachments to Document: ☒ No ☐ Yes

Figure 11d

Click [Next].

Step 12: File a Claim Action screen displays. (Figure 12).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

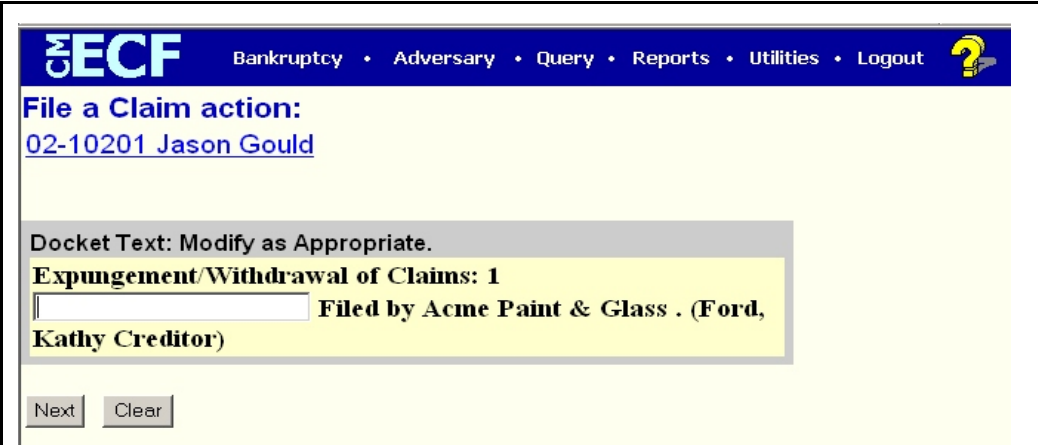
Enter Claim Number(s): Status:

Figure 12

Enter the number of the claim you are withdrawing and select “Withdraw” in the Status box.

Click [Next].

Step 13: Modify Docket Text Box is displayed (Figure 13).



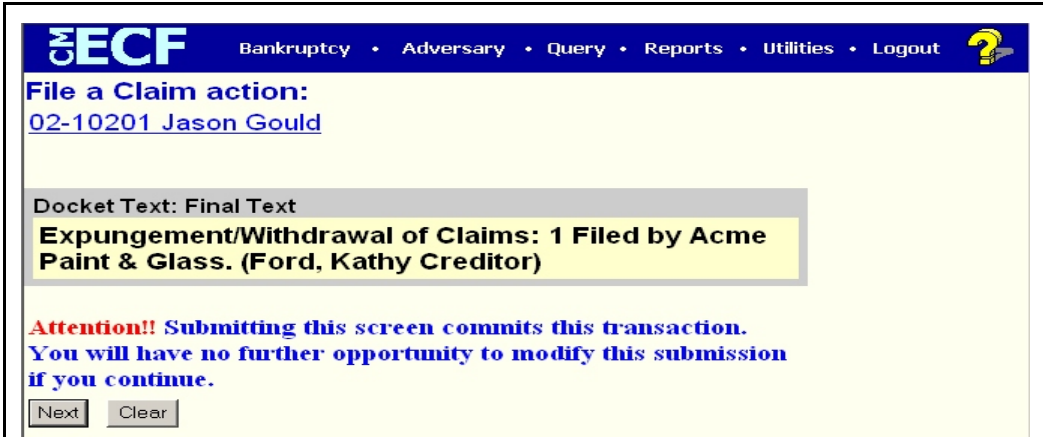
The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is "File a Claim action:" followed by the case number "02-10201 Jason Gould". The main content area is a light yellow box. Inside this box, there is a section titled "Docket Text: Modify as Appropriate." which is highlighted in grey. Below this section, there is a yellow box containing the text "Expungement/Withdrawal of Claims: 1". Below this text, there is a text input field containing the number "1". To the right of the input field, the text "Filed by Acme Paint & Glass . (Ford, Kathy Creditor)" is displayed. At the bottom of the yellow box, there are two buttons: "Next" and "Clear".

Figure 13

If appropriate, enter text in the free test box.

Click **[Next]** to continue.

STEP 14 The **FINAL TEXT EDITING** screen will display next (Figure 14)



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Claim action:
[02-10201 Jason Gould](#)

Docket Text: Final Text

Expungement/Withdrawal of Claims: 1 Filed by Acme Paint & Glass. (Ford, Kathy Creditor)

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Figure 14

Carefully verify the final docket text. This is your last chance to change this entry before it becomes an official part of the case record.

If the final docket text is incorrect:

Click the browser **[Back]** button to find the screen to be modified.

To abort or restart the transaction, click the **Bankruptcy** hypertext link on the **Menu Bar**.

If correct, click **[Next]**.

STEP 15 The **NOTICE OF ELECTRONIC FILING SCREEN** will be generated and displayed for viewing (Figure 15).

